OpenTable User Manual

MoreGuests MoreSatisfied MoreOften

www.OpenTable.com

Version 7.0

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Chapter 1: Introduction

What's New in v7.0

OpenTable, Inc. continues to be the leading provider of Internet-enabled customer relationship management (CRM), marketing, yield management and reservations solutions to the $538 billion global foodservice industry. With the release of v7.0 of the *OpenTable* software, we continue to bring to market new functionality that will enhance the feature set and usability of the *OpenTable* electronic reservation book.

New Features

The v7.0 release of the *OpenTable* Restaurant and Guest Management Software has several new features, including the redesign of all administration and configuration tasks and the redesign of the *Top Navigation Bar.* Many of the new features can be found in *Admin View* or on the *Top Navigation Bar.* Some of the new features in v7.0 include:

- **Redesigned Administration and Configuration Area**
  All *OpenTable* system configuration has been completely redesigned and is now performed directly within the main *OpenTable* system - there is no longer a separate Configuration Tool. Simply tap *Admin View* to see the new configuration options.
- **Scheduling Wizard**
  The new *Scheduling Wizard* has several short, step-by-step wizards that walk users through basic scheduling tasks like opening and closing shifts and days, changing default schedules, etc.
- **Scheduling Changes from the Sheet and Book Views**
  One of the new features on the *Top Navigation Bar* is the *Options* button. Tap the *Options* button to access the new *Scheduling Wizard* and other configuration options, including opening and closing a day / shift and editing reservation sheets and floor layouts.
- **Configure Floor Timers**
  In *Floor View,* floor timers track how long a party has been seated based on turn time settings. Users can configure the warning display setting's color and time to alert restaurant staff when a party is expected to leave soon or if a party has gone past their expected turn time.
- **Resend Reservation Confirmation E-Mails**
  Users can resend confirmation E-Mails for phone reservations using the *Change* button on the *Top Navigation Bar.* Users can resend confirmation E-Mails whenever they change a reservation's date, time or party size.
- **Guest Search by E-Mail and Company Name**
  In addition to searching a guest by name and phone number, users can also search for guests by E-Mail Address or Company Name or Member ID.
- **Data Archiving**
  The *OpenTable* system will automatically archive old reservation and guest data. Any reservation older than 18 months or any guests that have not made a reservation in the last 24 months will be archived. Archiving is important for improving the speed and response time of the *OpenTable* system.
- **Offline Indicator**
  On the *Top Navigation Bar* is a new offline indicator that turns red and displays "Offline" when the restaurant's *OpenTable* system cannot communicate with the *OpenTable* website (web diners cannot make reservations into the restaurant when this occurs). Tap the indicator to see more details and some troubleshooting tips.

A full list of new features can be found in a separate document called: "What's New in Opentable Software v7.0."

Conventions Used in This Manual

The User Manual assumes that the user is using a touchscreen when using the system and will use phrases like "Double tap the reservation" or "Touch OK" when describing user interactions with the system. Users can also connect and use a mouse with the *OpenTable* system. If you are using a mouse, simply substitute the word "click" in place of "tap" or "touch" for all instructions (e.g. "Double click the reservation" or "Click OK").

The terms "guest", "customer", and "diner" are used interchangeably throughout the User Manual to refer to restaurant patrons that make reservations and/or dine at a restaurant.

OpenTable System Differences by Country

The *OpenTable* software has fairly robust support for system installation and configuration for restaurants outside of the US, including support for international addresses and phone numbers. There are subtle user interface and formatting differences, depending on the default country configuration of the system.

Required Guest Fields

When adding guests to the system in *Guests View* or the *Make A Reservation Dialog*, all countries except for Japan will require both a first and a last name for the guest. Systems configured for Japan will only require a last name for the guest.

Country (In Addresses)

All configurations will have a country field as part of the address (guests, restaurants, hotels, etc.). The user interface for the country is a dropdown box containing a list of countries in alphabetical order. The value of the country field defaults to the country that has been configured as the default country for your *OpenTable* system. While viewing the dropdown box, typing a letter will move the user to the first country in the list that begins with that letter.

State/County/Region/Province (In Addresses)

The user interface for editing the state / county / region / province of the address will vary, depending on the selected country for the address. For US, Canadian, Mexican, and Hong Kong addresses, the state / county / region / province field will be a dropdown box. In all other cases, this field will be a text entry field. There are also more stringent validation rules for guest addresses. For more information, refer to "Guest Addresses" on page 74.

Phone Numbers

The user interface for phone numbers for US and Canadian installations will display an area code but will NOT display a country code for the phone number unless an international phone number was imported into the *OpenTable* system. For all other locations, the system will display a country code field for ALL phone numbers instead of an area code dropdown. Country code is a required field for these locations and

will pre-populate with the country code for the country that has been configured for your *OpenTable* system. In the example below, the guest's phone number is displayed with a country code.

Figure 1-1: International Phone Numbers in the Make A Reservation Dialog

In the *Sheet View*, local guest telephone numbers are displayed without country codes. Phone numbers for guests from outside the country are displayed in the international format with a "+" and then the country code followed by the telephone number.

Time	Max	Tbl	Name	#	St	Phone	N	Made
17:15	0		Buckley, Doris	4	NC	0207 789 0000 @ Work	VIP	10/01
17:15	0		Tanner, Dan	4	C	207 0786 5123 @ Home		10/01
17:30	2		Blocked	0				01/02
17:30	2		Simpson, Mike	2	NC	20778 912789 @ Home	VIP	10/01
17:30	4		Gardner, Nathalie	4	LA	+852 21266658	VIP	10/01
17:30	6							
17:45	0		Lee, Jessica	2	LM	+1 650.555.0032	VIP Fri	10/01
18:00	2		Ciparetti, Sylvio	4	NC	0207 432 1254 @ Home		10/01

Figure 1-2: International Phone Numbers in the Sheet View

Validation rules and display formats for phone numbers will also vary, depending on the country configuration. The system will display phone numbers in the following default formats:

Country	Format
Canada	<Area Code> <Phone #> <Extension> 123.456.7890 x 99999
France	+<Country Code> <Phone #> <Extension> +33 12 34 56 78 90 x 99999
Germany	+<Country Code> <Phone #> ><Extension> +49 1234 5678 x99999
Hong Kong	+<Country Code> <Phone #> <Extension> +852 1234 5678 x 99999

Table 1-1: Phone Formats by Country

Country	Format
Japan	+<Country Code> <Phone #> <Extension> +81 123 456 7890 x 99999 or +81 123 4567 8901 x99999
Mexico	+<Country Code> <Phone #> <Extension> +52 1234 5678 x 99999
Singapore	+<Country Code> <Phone #> <Extension> +65 1234 5678 x 99999
Spain	+<Country Code> <Phone #> <Extension> +34 123 456 789 x 99999
United Kingdom	+<Country Code> <Area Code> <Phone #> <Extension> +44 1234 567 8901 x 99999 (Default) or +44 123 4567 8901 x 99999 or +44 12345 678901 x99999
United States	<Area Code> <Phone #> <Extension> 123.456.7890 x 99999

Table 1-1: Phone Formats by Country

Dates and Time

Date displays will vary depending on the country configuration.

Auto-Closed Special Dates and Holidays

Days that are automatically closed in the reservation book will vary by country.

Reporting

In the guest, special occasions, and mailing labels reports and when generating a Marketing E-Mail distribution list, you can filter by area code for systems configured for the US and Canada only.

Report print outs are configured to print on Letter size paper for systems configured for the US and Canada. All other country configurations will print reports on A4 size paper. This is a configurable setting.

Getting Started and Logging on

Turn on your *OpenTable* terminal. Depending on the type of computer you have, the power switch is located either on the left side of the terminal or on the front of the computer.

1. The computer will run through a series of checks and will eventually prompt you to press **Ctrl-Alt-Del** to login to the computer.
2. Press all three keyboard buttons simultaneously. The *Log On to Windows Dialog* will appear.
3. In the *User Name* field, enter "opentable" without the quotes. Tab to the *Password* field and enter your password for the opentable user. Check with your restaurant staff about your user names and passwords. Press **Enter** on the keyboard or tap **OK**.

4. Wait while the system continues its start-up process. Once the system displays the Windows desktop, look for and double-tap the **OpenTable** icon on the desktop. Alternatively, tap the **Start** button and then the **OpenTable** icon. The system will load and open to the *Sheet View*. You are ready to begin using the *OpenTable* system.

Exiting the OpenTable System

To exit the *OpenTable* system:

1. Press the **Shift** and **F10** keys on the keyboard simultaneously.
2. The system displays a confirmation dialog. Tap **Yes** to shutdown the *OpenTable* system and return to the Windows desktop.

Restarting the OpenTable System

To launch the *OpenTable* system:

1. Double-tap the **OpenTable** icon on the desktop. Alternatively, tap the **Start** button in the lower left corner of the screen. If the Start button is not visible, press the **Ctrl** and **Esc** keys on the keyboard simultaneously to display the Windows Start Menu.
2. Tap the **OpenTable** icon on the Start Menu to launch the system.

Restarting the OpenTable Terminal

To restart or turn off the *OpenTable* terminal:

1. Exit the *OpenTable* system by pressing **Shift** and **F10** as outlined above.
2. Once you have exited, tap the **Start** button in the lower left hand portion of the screen or press **Ctrl** and **Esc** on the keyboard to display the Windows Start Menu.
3. Tap **Shut Down**. The *Shut Down Windows Dialog* is displayed.
4. To restart the terminal, select the "Restart" option in the dropdown list. To shutdown the terminal, select the "Shut Down" option in the dropdown list.
5. Press **Enter** on the keyboard or tap **OK**.

Chapter 2: Sheet View and Book View

Navigation Bars

Use the *Top* (horizontal) *Navigation Bar* to select dates and times for reservations and to manipulate reservations and slots. New features on the *Top Navigation Bar* will help you navigate the system more efficiently (for more information, refer to "New Features in the Top Navigation Bar" on page 7). Use the *Side Navigation Bar* to move through the different views within the *OpenTable* system. You can configure the *Side Navigation Bar* to appear on the left or right side of the screen (for more information, refer to "Navigation Bar" on page 139). Both navigation bars are visible in all views except in the *Reserve View and Guest View.*

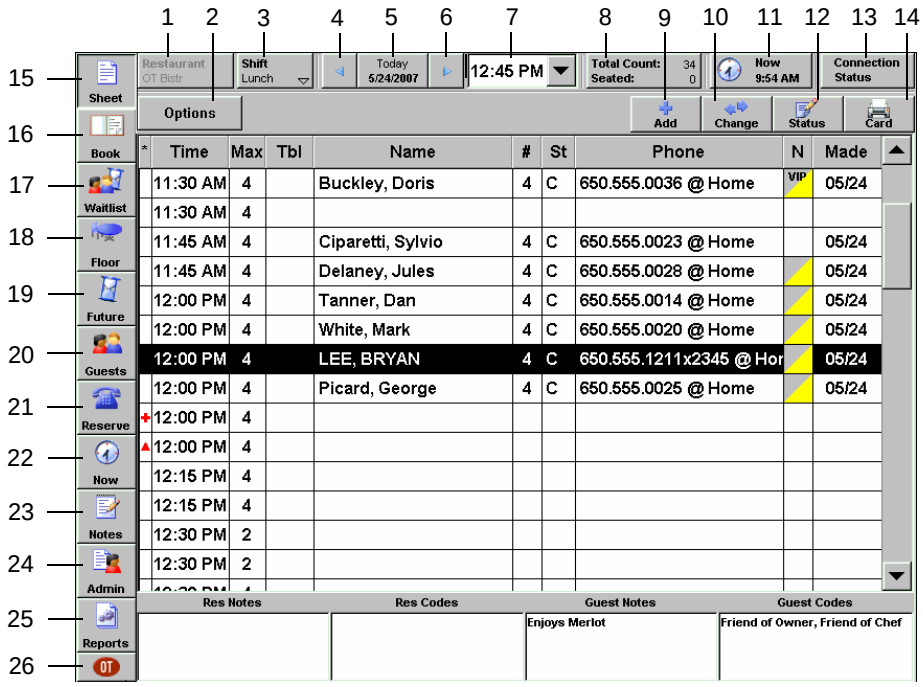


Figure 2-1: Top and Side Navigation Bars in Sheet View

1	Restaurant	Display Restaurant name	14	Card	Print chit for highlighted party
2	Options	Change Schedule/Sheets	15	Sheet View	Display Sheet View
3	Shift	Change shifts	16	Book View	Display Book View
4	Day Back	Move calendar back one day	17	Waitlist	Show current shift In-House Waitlist
5	Date	Display calendar	18	Floor View	Display Floor View
6	Day Forward	Move calendar forward one day	19	Future	Show waitlist for future dates
7	Time Dropdown	Jump to the selected time slot	20	Guests View	Search/edit guests
8	Cover Count	Show covers for day/shift	21	Reserve View	Display Reserve View
9	Add	Insert a reservation slot	22	Now	Display shift for current date / time
10	Change	Change highlighted entry	23	Notes	Display restaurant & shift notes
11	Now	Display shift for current date/time	24	Admin	Configure system settings, schedules
12	Status	Change reservation status	25	Reports	Access system reports
13	Connection Status	Show Web connection status	26	(About) OT	Display version information

New Features in the Top Navigation Bar

The *Top Navigation Bar* contains three new features:

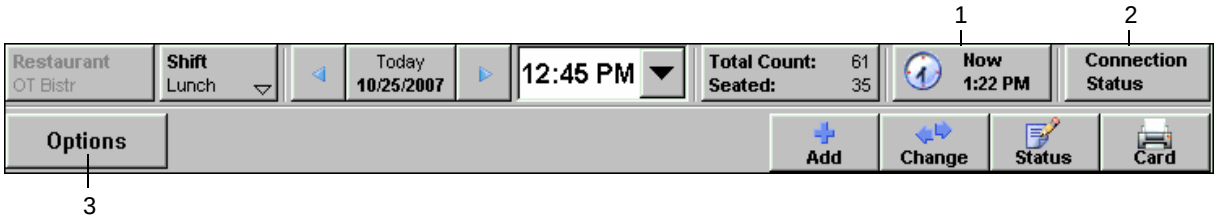


Figure 2-2: New Top Navigation Bar

1	Now	Brings you to the current shift and time	3	Options	List of options for making changes to schedules and reservation sheets
2	Connection Status	View online connection status with the OpenTable website			

Connection Status button

Tap the **Connection Status** button to view the *Status Panel Dialog*. See a detailed description of your *OpenTable* connection status.

1. If you are offline, follow the troubleshooting suggestions and tap **Connect Now**, and then tap **Close**.
2. The system will attempt to restore your web connection.
3. If you still experience connectivity problems, contact *OpenTable*. See the back of the User Manual for contact information.

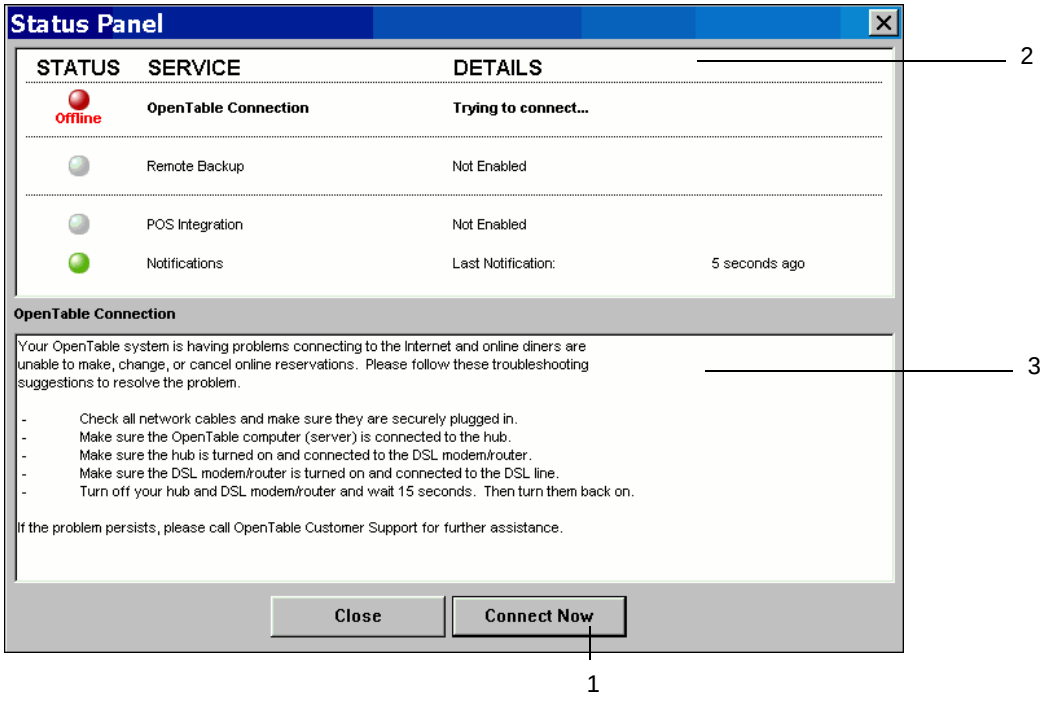

Status Panel
STATUS
SERVICE
DETAILS
Offline
OpenTable Connection
Trying to connect...
Remote Backup
Not Enabled
POS Integration
Not Enabled
Notifications
Last Notification:
5 seconds ago
OpenTable Connection
Your OpenTable system is having problems connecting to the Internet and online diners are unable to make, change, or cancel online reservations. Please follow these troubleshooting suggestions to resolve the problem.
- Check all network cables and make sure they are securely plugged in.
- Make sure the OpenTable computer (server) is connected to the hub.
- Make sure the hub is turned on and connected to the DSL modem/router.
- Make sure the DSL modem/router is turned on and connected to the DSL line.
- Turn off your hub and DSL modem/router and wait 15 seconds. Then turn them back on.
If the problem persists, please call OpenTable Customer Support for further assistance.
Close
Connect Now
2
3
1

Figure 2-3: Status Panel Dialog

Options

In the new *Options Dialog*, you can easily change your schedule and your reservation sheet (*Close This Day*, *Close This Shift* or *Edit this Reservation Sheet*) for this day or tap the **Scheduling Wizard** for step-by-step instructions to perform other scheduling tasks. If the system is configured to password protect one or more of these features, the system will prompt you for a password. For more information, refer to "Access Rights" on page 179.

Tap the **Options** button to view the *Options Dialog.*

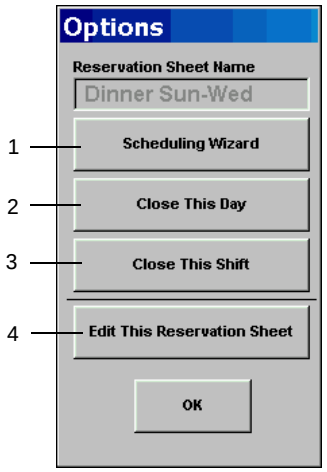


Figure 2-4: Options Dialog

1	Scheduling Wizard	See a list of different Wizard options	3	Close This Shift	Launch Wizard to close the shift you are viewing
2	Close This Day	Launch Wizard to close the day you are viewing	4	Edit This Reservation Sheet	Edit the current sheet you are viewing

The day or shift you are trying to close must not contain any reservations.

Scheduling Wizard Main Menu

When you tap the **Options / Scheduling Wizard** buttons, you will see the *Scheduling Wizard Main Menu*. There are several tasks that you can select, such as opening or changing a shift. The *Scheduling Wizard* provides step-by-step instructions to help you complete the task.

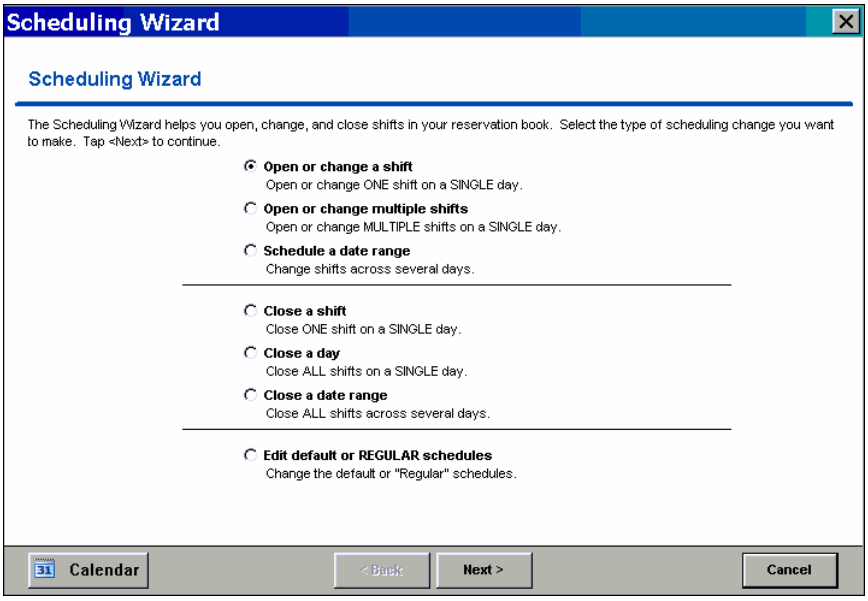

Scheduling Wizard
Scheduling Wizard
The Scheduling Wizard helps you open, change, and close shifts in your reservation book. Select the type of scheduling change you want to make. Tap <Next> to continue.
Open or change a shift
Open or change ONE shift on a SINGLE day.
Open or change multiple shifts
Open or change MULTIPLE shifts on a SINGLE day.
Schedule a date range
Change shifts across several days.
Close a shift
Close ONE shift on a SINGLE day.
Close a day
Close ALL shifts on a SINGLE day.
Close a date range
Close ALL shifts across several days.
Edit default or REGULAR schedules
Change the default or "Regular" schedules.
Calendar
< Back
Next >
Cancel

Figure 2-5: Scheduling Wizard Main Menu

Close This Day

When you tap **Options / Close This Day** button, the system takes you to the *Close a Day - Confirmation Step*. Verify that the date is correct and tap **Finish** to complete this action.

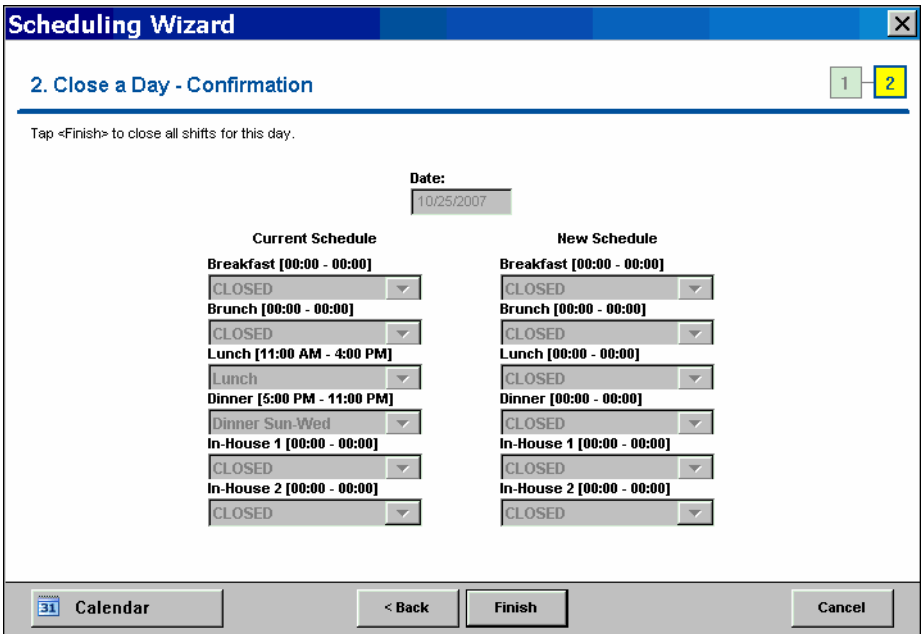


Figure 2-6: Scheduling Wizard's Close a Day Confirmation Dialog

Close This Shift

When you tap **Options / Close This Shift** button, the system takes you to the *Close A Shift - Confirmation Step*. View the *Select Shift* section and select the shift that will be closed. Tap **Finish** to complete this action.

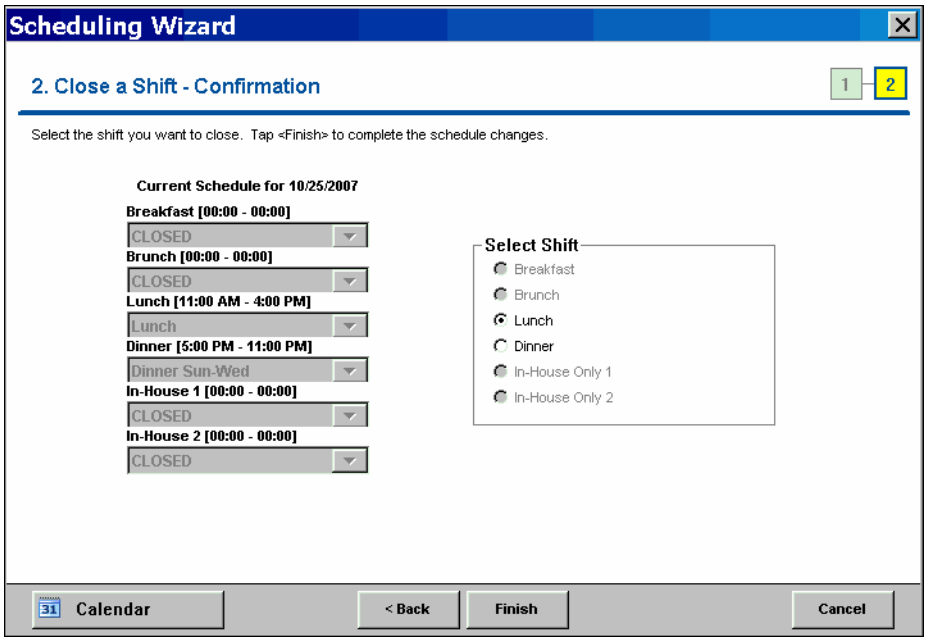


Figure 2-7: Scheduling Wizard's Close This Shift Dialog

You can only Close A Day or Shift that has no pending reservations.

Edit This Reservation Sheet

When you tap **Options / Edit This Reservation Sheet** button, the system takes you to the reservation sheet scheduled for the current day and shift you are viewing. You can add slots, change slots or copy the reservation sheet. For more information, refer to "Editing a Reservation Sheet - Details" on page 86. Tap **Save** on the *Top Navigation Bar* to save your changes. Tap the **Exit** button to return to *Sheet View*.

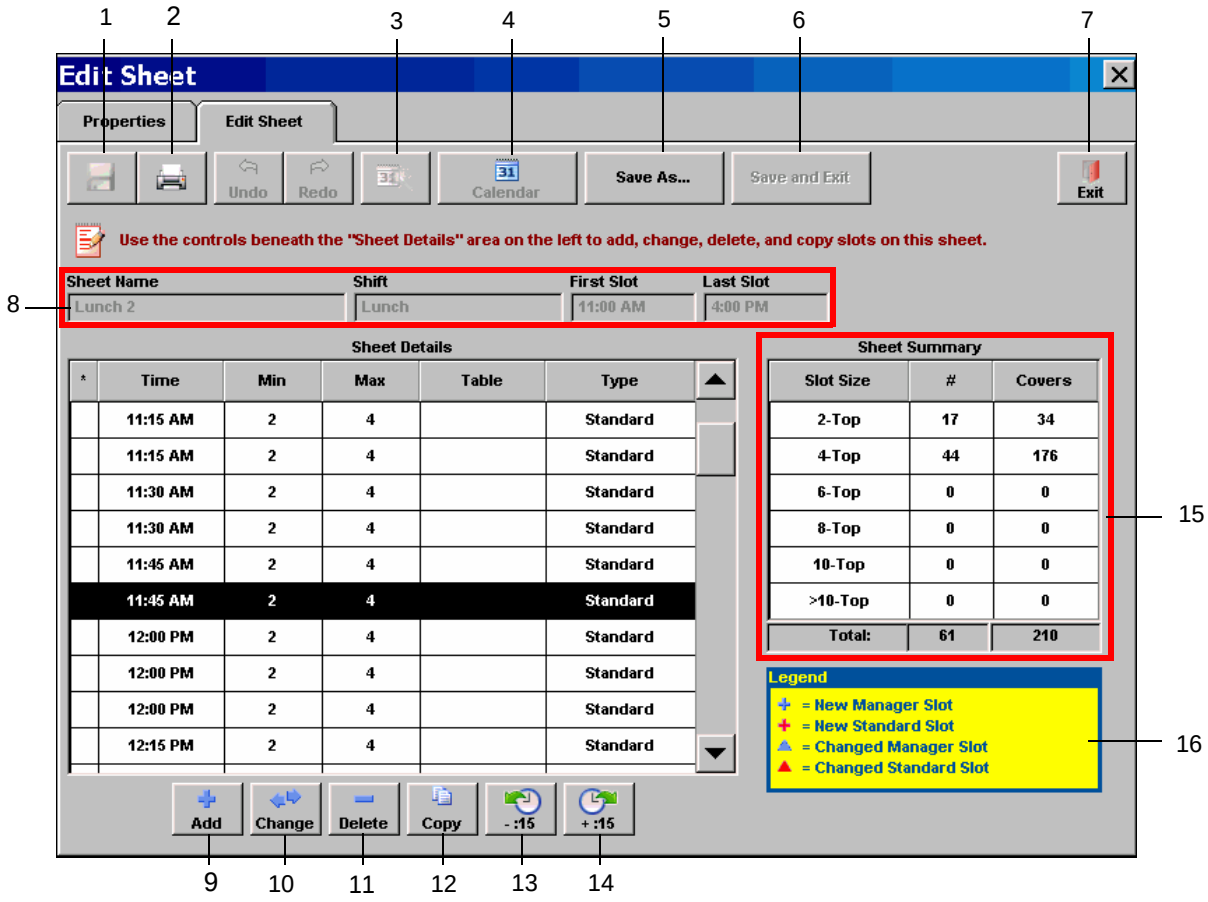


Figure 2-8: Edit Sheet Dialog

1	Save	Save your changes	9	Add	Add one or more slots
2	Print	Print your reservation sheet	10	Change	Change the selected slot(s)
3	Scheduling Wizard	Provides step-by-step instructions to complete a task	11	Delete	Delete the selected slot(s)
4	Calendar	Return to Calendar view	12	Copy	Copy the selected slot(s)
5	Save As	Save sheet using a new sheet name	13	-:15 icon	Move the highlighted slot(s) 15 minutes earlier than the slot's current time setting
6	Save and Exit	Saves your changes and Exits the Edit Sheet dialog	14	+ :15 icon	Move the highlighted slot(s) 15 minutes later than the slot's current time setting
7	Exit	Exit the Edit Sheet dialog	15	Sheet Summary	Slot and cover counts by slot size
8	Sheet Details	Displays Sheet Name, Shift, First and Last Time Slots	16	Legend	Defines symbols that appear in "*" column

Sheet View

The *Sheet View* is one of four views that allow you to view, make, change, and cancel reservations in your reservation book (the others are *Book View, Reserve View*, and *Floor View*). The *Sheet View* provides the most detailed information about each reservation at a glance.

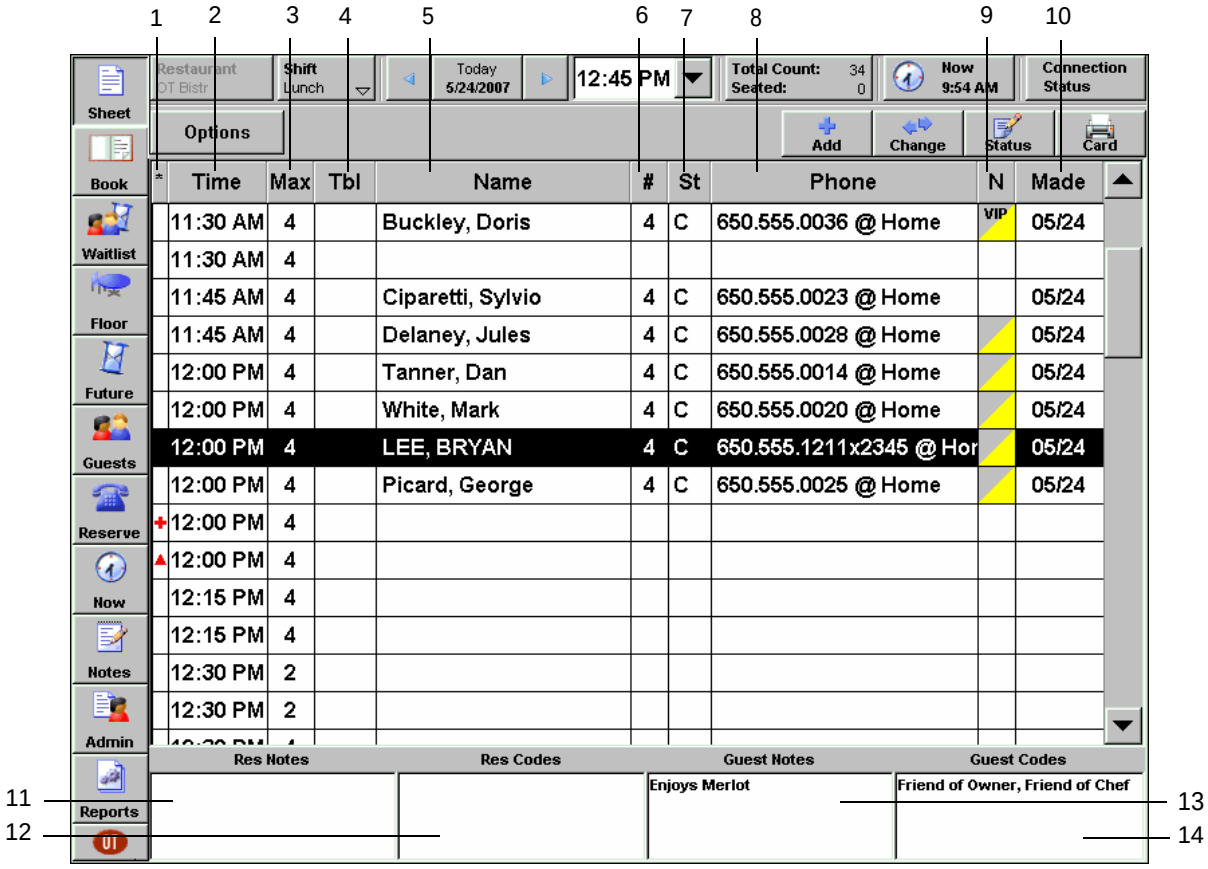


Figure 2-9: Sheet View

1	*	Displays symbols that signify an inserted slot, changed slot, or Expired Manager Slot	8	Phone	Guest phone #
2	Time	Time of the reservation or slot	9	Notes (N)	Red flag indicates a reservation note. Yellow flag indicates a guest note. Guest Recognition Codes also appear in this column
3	Max	Recommended max party size of the reservation slot	10	Made	Date the reservation was made
4	Table (Tbl)	Pre-assigned or seated table #	11	Res Notes	Preferences, special requests, and comments for this reservation only
5	Name	Guest name (last, first). Also shows "Walk-In", Blocked Slot, Manager Slot, or Expiring Manger Slot	12	Res Codes	Reservation Codes for this reservation only
6	Size (#)	The actual # of people for the reservation	13	Guest Notes	Guest preferences & comments for this guest
7	Status (St)	Shows reservation status code (background color also indicates the reservation status)	14	Guest Codes	Guest Codes for this guest

Book View

The *Book View* is another view that allows you to manage your reservations in the reservation book. The *Book View* shows you less detail than the *Sheet View* about each reservation but provides a more global view of your entire shift by showing you more reservations on one screen.

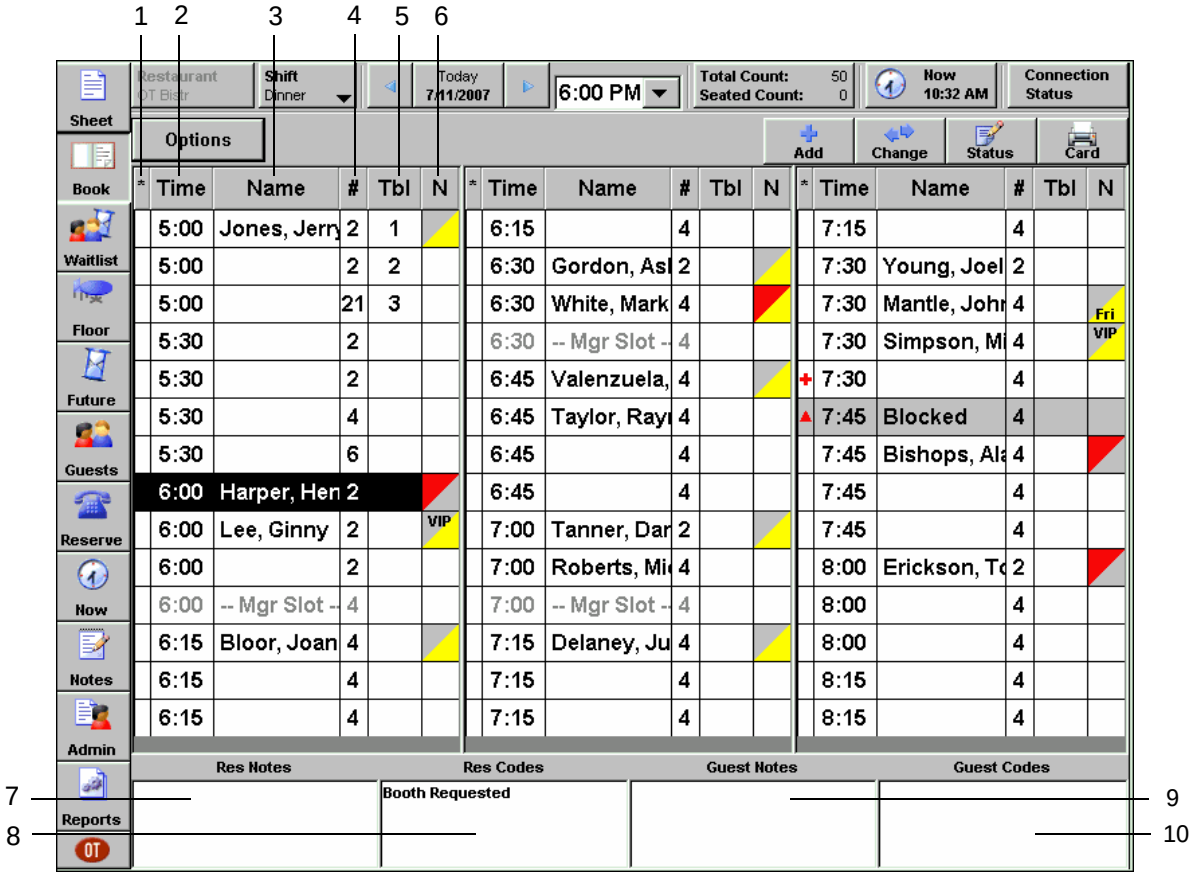


Figure 2-10: Book View

1	*	Displays symbols that signify an inserted slot, changed slot, or Expired Manager Slot	6	Notes (N)	Red flag indicates a reservation note. Yellow flag indicates a guest note. Guest Recognition Codes also appear in this column
2	Time	Time of the reservation or slot	7	Reservation Notes	Preferences, special requests, and comments for this reservation only
3	Name	Guest name (last, first). Also shows "Walk-In", Blocked Slot, Manager Slot or Expiring Manager Slot	8	Reservation Codes	Reservation Codes for this reservation only
4	Size (#)	Actual # of people for a booked reservation or the recommended party size if it is an empty slot	9	Guest Notes	Guest preferences & comments for this guest
5	Table (Tbl)	Pre-assigned or seated table number	10	Guest Codes	Guest Codes for this guest

Making a Reservation in Sheet or Book View

There are several ways to make a reservation in the *OpenTable* system. This section will cover making a reservation in the *Sheet View* and *Book View*. The steps are nearly identical.

Making a Reservation

To make a reservation:

1. Tap the **Sheet View** or **Book View** buttons on the *Side Navigation Bar.*
2. If you have multiple shifts open on that day, go to the *Top Navigation Bar* and tap the **Shift** button to change to a different shift on the same day.
3. Tap the **Date** button to display a calendar.
4. Navigate to and tap the desired date, then tap **OK**. The screen will refresh and display the day's reservations and available slots on the *Sheet View* or *Book View.*

Figure 2-11: Top Navigation Bar

Figure 2-12: Calendar

5. Tap an empty reservation slot and hit **Enter** on your keyboard or, double-tap the desired (empty) slot. The system displays the *Guest Identification Dialog.*

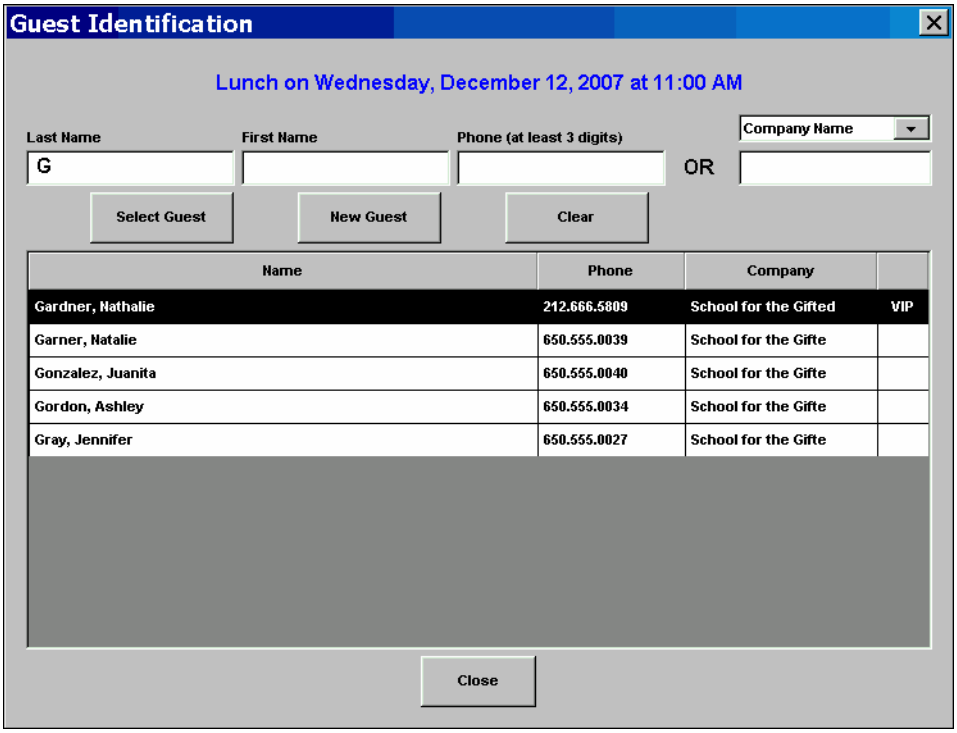


Figure 2-13: Guest Identification Dialog

6. Enter the guest's last name, first name and/or the guest's phone number or you can use the field on the right to search by E-Mail Address, Company Name, or Member ID. If the correct guest appears in the list (check the phone number), double-tap the name or tap the guest name once to highlight it and tap the **Select Guest** button. If there are no matches for your guest, tap the **New Guest** button to create a new guest record. The *Make A Reservation Dialog* will appear.

You can search by a combination of name and phone number or just by E-Mail Address, Company Name or Member ID.

Entering Reservation Details

You are now in the middle of making a reservation and have "locked" this reservation slot for a limited amount of time. During this time, you have exclusive rights to this slot and no one else will be able to make a reservation in this slot. On other terminals, the slot will display "-- *In Progress* --" in the name field. There is also a countdown timer at the top of the *Make A Reservation Dialog* that shows you how much time you have left to complete this reservation.

Complete the Reservation

To complete the reservation:

1. Input all reservation details on the *Make A Reservation Dialog*. When finished, tap the **Save** button.
2. Depending on how your reservation book is configured, the system may prompt you to enter some required fields (like phone number and user) or to enter a password when saving the reservation. If all required fields and passwords are entered correctly, then the system saves the reservation and refreshes the screen. The new reservation you added now appears in the book.

Features of the Make A Reservation Dialog

The *Make A Reservation Dialog* contains many features that are useful for tracking reservation information and any special guest requests.

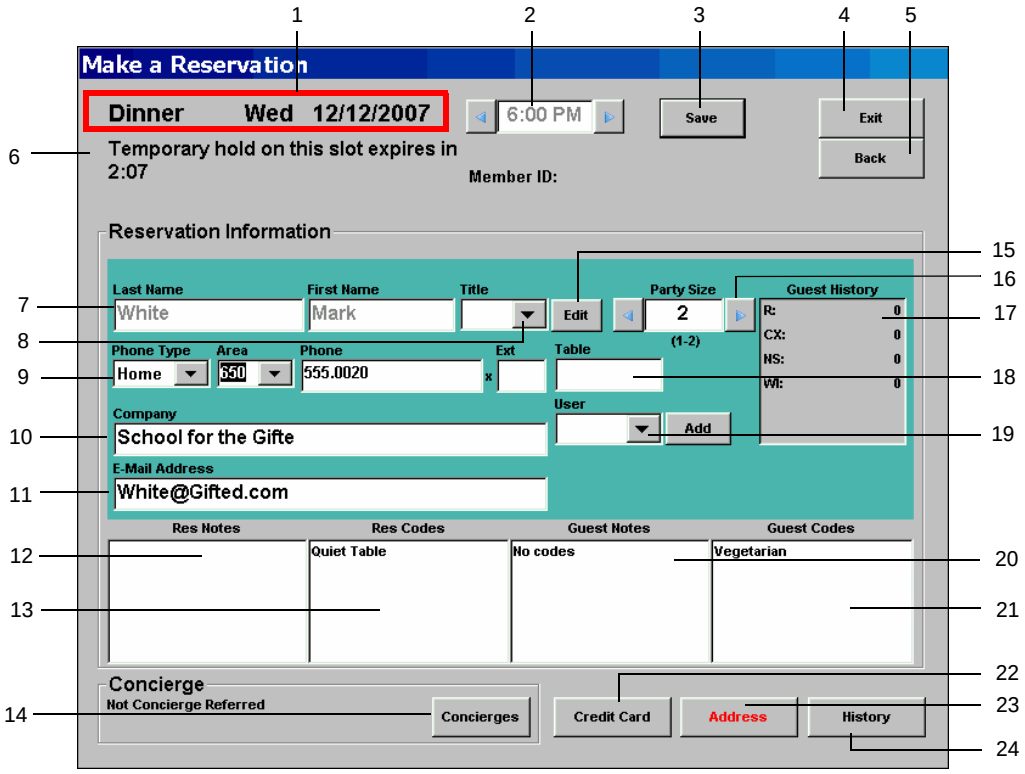


Figure 2-14: Make A Reservation Dialog

1	Shift/Date	Shift and date of reservation	13	Res Codes	Reservation Codes for this reservation
2	Time Controls	Changes the reservation time (may be password protected)	14	Concierges	Select the hotel and/or concierge that referred the guest
3	Save	Saves the reservation	15	Edit	Enables user to change the spelling of the guest's name
4	Exit	Discards any changes to the reservation	16	Party Size	# of diners in the party (changes may be password protected)
5	Back	Takes you back to the guest search list and does not save	17	Guest History	# of reservations, cancellations, no shows and walk-ins; total & average guest spend
6	Timer	Displays amount of time left for the reservation slot lock	18	Table	Pre-assigned or actual table #
7	Name	Guest's name	19	User	User that took the reservation
8	Title	Guest's title	20	Guest Notes	Guest preferences and comments
9	Phone	Guest's phone # (multiple types)	21	Guest Codes	Guest Codes for this guest
10	Company	Guest's company	22	Credit Card	Credit card for reservation, if required
11	E-Mail	Guest's E-Mail address	23	Address	Displays the guest's address
12	Res Notes	Preferences, requests, comments for this reservation only	24	History	Displays the guest's dining history

Hotels and Concierge Referrals

You can track reservation referrals from concierges and hotels when making reservations.

To add a concierge to a guest reservation:

1. Tap the **Concierges** button at the bottom of the *Make A Reservation Dialog*. The system displays a list of hotels and their concierges.
2. Tap the name of the desired hotel to highlight and select it. Once a hotel is highlighted, all concierges for that hotel appear in the concierge list on the right. Start typing in the *Search Concierge List* field to jump to the concierge. Tap the desired concierge name to highlight and select the concierge (to unselect, tap the **Clear** button).
3. Tap **Select** to complete your selection and return to the *Make A Reservation Dialog*. The selected hotel and concierge name will appear in the lower left portion of the dialog. Selecting a hotel or concierge will automatically assign the "Hotel Referral" reservation code to the reservation.

Managing the Hotel and Concierge Lists

You can add hotels and concierges while on the *Hotel and Concierges Dialog*. Tap the **Add** button at the bottom of the *Hotels list* on the left to add a new hotel. Tap the **Add** button at the bottom of the *Concierge list* on the right to add a new concierge. To make changes to an existing, highlighted hotel or concierge, tap the corresponding **Change** button. To remove a hotel or concierge from the list, highlight the selection and tap the corresponding **Delete** button. For more information, refer to "Hotels and Concierges" on page 167.

Credit Cards

The **Credit Card** button is used to save a credit card for a reservation. Data is saved as part of the reservation and not in the guest's record.

1. Enter the type of card, number, expiration date, and name as it appears on the card.
2. Tap **OK** to save or **Cancel** to discard.

Once credit card information is entered, the *Credit Card* button text will turn red. Depending on the system's configuration, the system may require a password to view and edit the information once it is saved.

Addresses

Tap **Address** on the *Make A Reservation Dialog* to enter the guest's address. Addresses are important for generating mailing labels for restaurant marketing and mailings.

Reservation History

Tap **History** on the *Make A Reservation Dialog* to display a guest's reservation history at your restaurant. The reservation history displays the day, date, time, server, and table # of the reservation.

Reservation Notes and Codes

Tap the **Res Notes** area to enter any special requests or notes for the reservation (i.e. "Need to finish by 7:45 to make show"). Tap the **Res Codes** area to display a list of available reservation codes that you can assign to this reservation. Assign reservation codes (i.e. Anniversary) to the reservation by tapping the code to highlight it. Tapping the code again will un-assign the code. Note that reservation notes and codes are only associated with the reservation (and not with the guest).

Guest Notes and Codes

Tap the **Guest Notes** area to enter any special requests or notes for the guest (i.e. Likes Table 11). Tap the **Guest Codes** area to display a list of available *Guest Codes* that you can assign to this guest. Assign guest codes (i.e. VIP) to the guest by tapping the code to highlight it. Tapping the code again will un-assign the code. Note that guest notes and codes are associated with the guest and will always be displayed for all reservations made for that guest.

Using reservation and guest codes are an excellent method of grouping and sorting reservations and guests. Many of the reports can be filtered by these codes. For more information, refer to "Reservation and Guest Codes" on page 163.

Reservation Slot Locking - What Happens When Time Expires

Reservation slot locking is especially important in busy multi-user restaurants. Reservation slots are locked temporarily when you begin making a new reservation. If time expires before you complete and save the reservation, the slot is released to other users. If no one else takes the slot, you can still complete your reservation by entering the reservation details and tapping **Save**. However, if another user takes the slot, the system will prompt you to move the reservation to another slot when you try to save it. The steps are the same as moving an existing reservation (for more information see the next section, *Moving Reservations*).

Changing a Reservation

There are two ways to move a reservation - using the **Change** button on the *Top Navigation Bar* or using the *Time Arrows* on the *Make A Reservation Dialog*. Each affects the reservation book differently.

Moving Reservations with the Change Button

Moving reservations can only be initiated from the *Sheet View* and *Book View*. Use this method to move reservations within the current shift or to different days. This type of move is the preferred method because it frees up the original reservation slot and places the reservation into an available slot. To move reservations using the *Change* button:

1. On *Sheet View* or *Book View*, highlight the reservation you wish to move by tapping the reservation.
2. Tap the **Change** button on the *Top Navigation Bar* to display the *Change Entry Dialog* choices.

Figure 2-15: Change Button on the Top Navigation Bar

3. In the *Change Entry Dialog*, tap **Move Entry**.

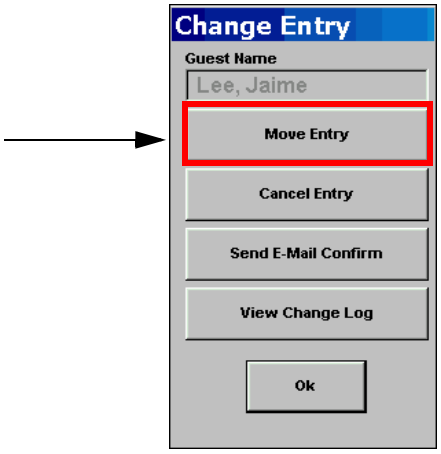


Figure 2-16: Move Entry Button on the Change Entry Dialog

4. The system will display the name and party size of the reservation you are moving at the bottom of the screen.

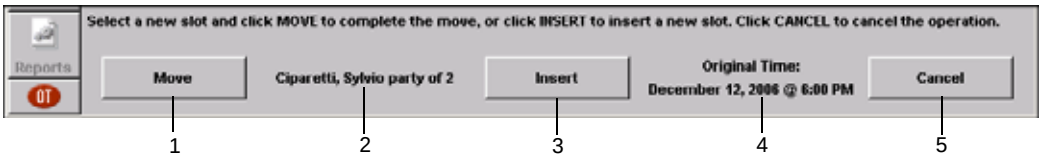


Figure 2-17: Controls for Moving an Existing Reservation

1	Move	Completes the move into the slot selected by the user	4	Original date and time	Original date and time of the reservation being moved
2	Party Info	Guest Name and party size	5	Cancel	Cancels the move
3	Insert	Moves the reservation into a newly inserted slot			

5. You now have three options:
   - To move the reservation to an existing empty reservation slot, tap the slot and tap the **Move** button (1) at the bottom of the view to complete the move. You can use the *Calendar* button on the *Top Navigation Bar* to move to a different day and search for an empty slot.
   - To move the reservation to a newly inserted reservation slot, tap the **Insert** button (3) at the bottom of the view to create the new slot and then tap **OK** to complete the move.
   - To cancel the move, tap the **Cancel** button (5).

If you are moving a reservation from a slot that was inserted at the same time that the reservation was made, the system will prompt you to keep or discard the resulting empty inserted slot on the shift.

View Change Log

The *Change Log* displays a history of changes that were made to a reservation, including when the reservation was made, changes to the date, time or party size, and the name of the computer that was used to make the changes. To view and / or print the *Change Log:*

1. On *Sheet, Book or Floor View*, highlight the reservation.

2. Tap the **Change** button on the *Top Navigation Bar* to display the *Change Entry Dialog.*
3. Tap the **View Change Log** button

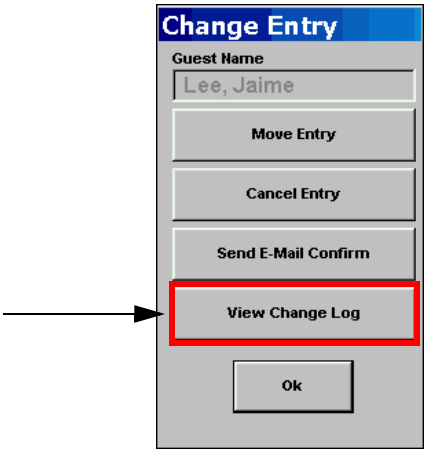


Figure 2-18: View Change Log Button on the Change Entry Dialog

4. The *Reservation Change Log Dialog* is displayed. Tap **Print** to print the *Change Log* or tap **OK** to exit.

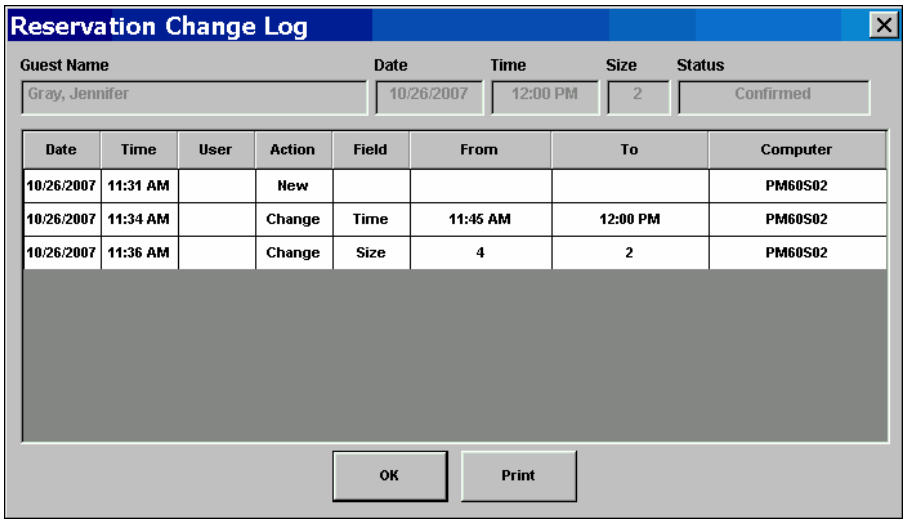


Figure 2-19: Reservation Change Log

Moving Reservations with the Time Control Buttons on the Make A Reservation Dialog

You can edit the existing reservation and use the time arrows at the top of the *Make A Reservation Dialog* to change the time. This method uses the same reservation slot but changes the time of that slot.

To move reservations using the time arrows:

1. From the *Sheet View, Book View*, or *Floor View*, double-tap the reservation. The system displays the *Make A Reservation Dialog.*

2. Tap the arrows on either side of the reservation time to change the reservation time.

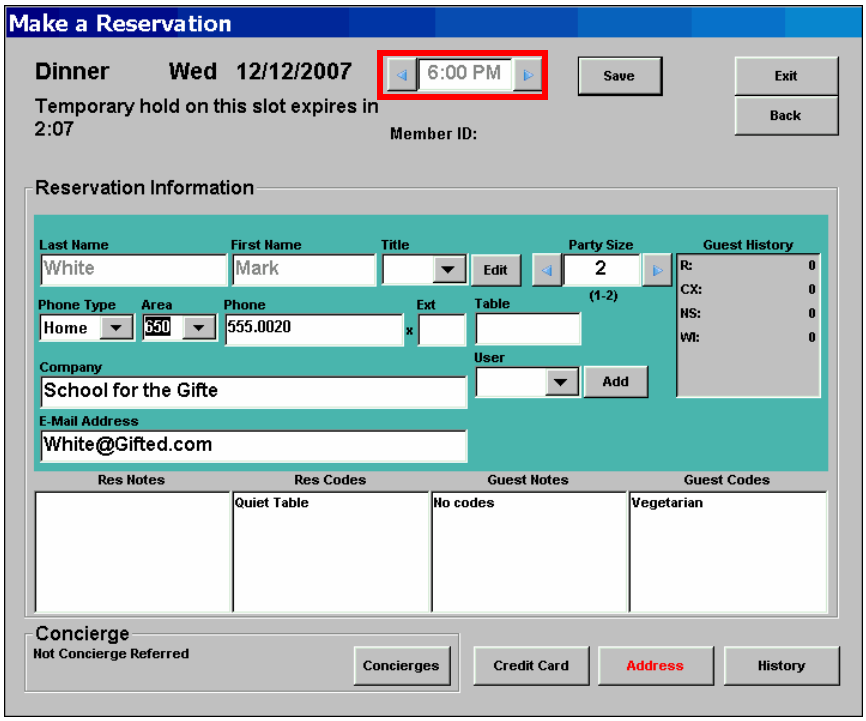


Figure 2-20: Changing the Reservation Time in the Make A Reservation Dialog

3. Tap the **Save** button to save the time change. If prompted, enter a password that has access to this area to continue.

Caution: Changing the time of the reservation slot can overbook your restaurant. It is better to move the party to a new slot instead.

Canceling a Reservation

There are two ways to cancel a reservation - using the *Status* button or using the *Change* button on the *Top Navigation Bar*. Both methods will give you the same result.

Canceling a Reservation Using the Status Button

1. On the *Sheet View, Book View,* or *Floor View*, highlight the reservation you wish to cancel by tapping the reservation.
2. Tap the **Status** button on the *Top Navigation Bar* to display the different status choices.

Figure 2-21: Status Button on the Top Navigation Bar

3. Tap the **Cancelled** status on the *Change Party Status Dialog*.

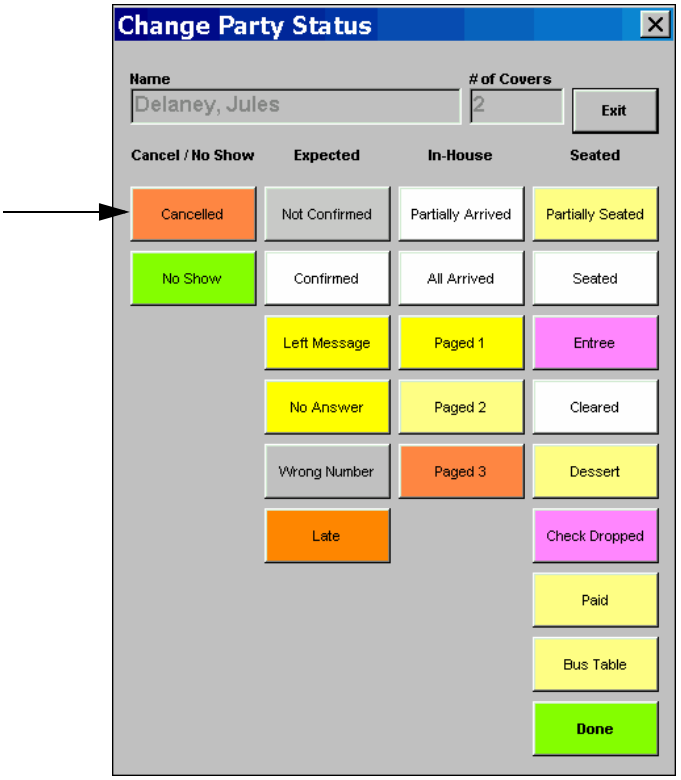


Figure 2-22: Cancelled Status on the Change Party Status Dialog

4. If prompted, enter a password that has access to this area to continue.
5. Tap **Yes** to confirm the cancellation or **No** to exit without canceling.

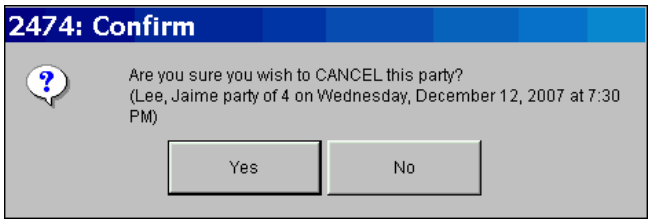


Figure 2-23: Cancellation Confirmation Dialog

6. If you tap **Yes**, the system cancels the reservation and removes it from all views.

Canceling a Reservation Using the Change Button

An alternate method to cancel reservations is to use the *Change* button.

1. On the *Sheet View, Book View*, or *Floor View*, highlight the reservation you wish to cancel by tapping the reservation.

2. Tap the **Change** button on the *Top Navigation Bar* to display the *Change Entry Dialog*.

Figure 2-24: Change Button on the Top Navigation Bar

3. Tap **Cancel Entry** on the *Change Entry Dialog*.

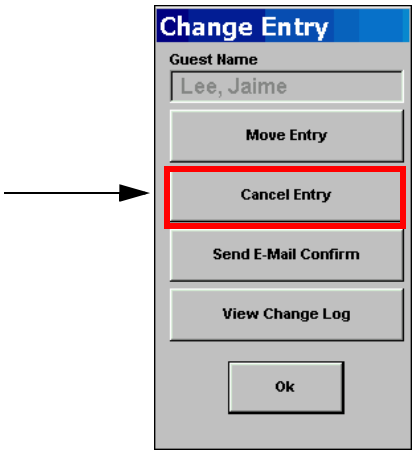


Figure 2-25: Cancel Entry Button on the Change Entry Dialog

4. If prompted, enter a password that has access to this area to continue.
5. Tap **Yes** to confirm the cancellation or **No** to exit without canceling.

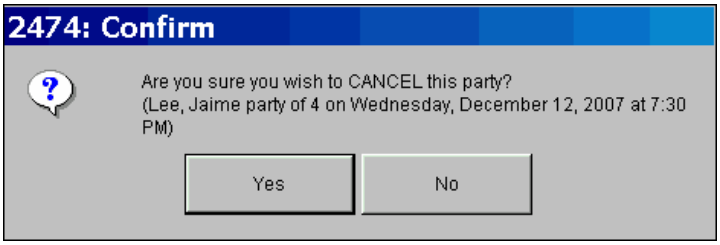


Figure 2-26: Cancellation Confirmation Dialog

6. If you tap **Yes**, the system cancels the reservation and removes it from all views.

Canceling a reservation will increment the guest's cancellation (CX) count in the guest history. For more information, refer to "Chapter 8: Guests View" on page 67. Note that the system will not allow you to cancel a reservation with a status of "Done".

If you are canceling a reservation that was made at the same time that the slot was inserted, the system will prompt you to keep or discard the resulting empty inserted slot on the shift.

No Showing a Reservation

To no show a party that does not show up for their reservation:

1. On the *Sheet View, Book View*, or *Floor View*, highlight the reservation you wish to no show by tapping the reservation.
2. Tap the **Status** button on the *Top Navigation Bar* to display the different status choices.

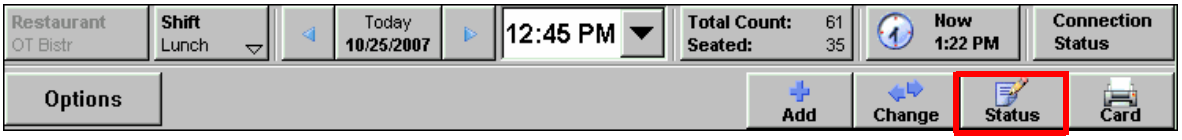


Figure 2-27: Status Button on the Top Navigation Bar

3. Tap **No Show** on the *Change Party Status Dialog*.

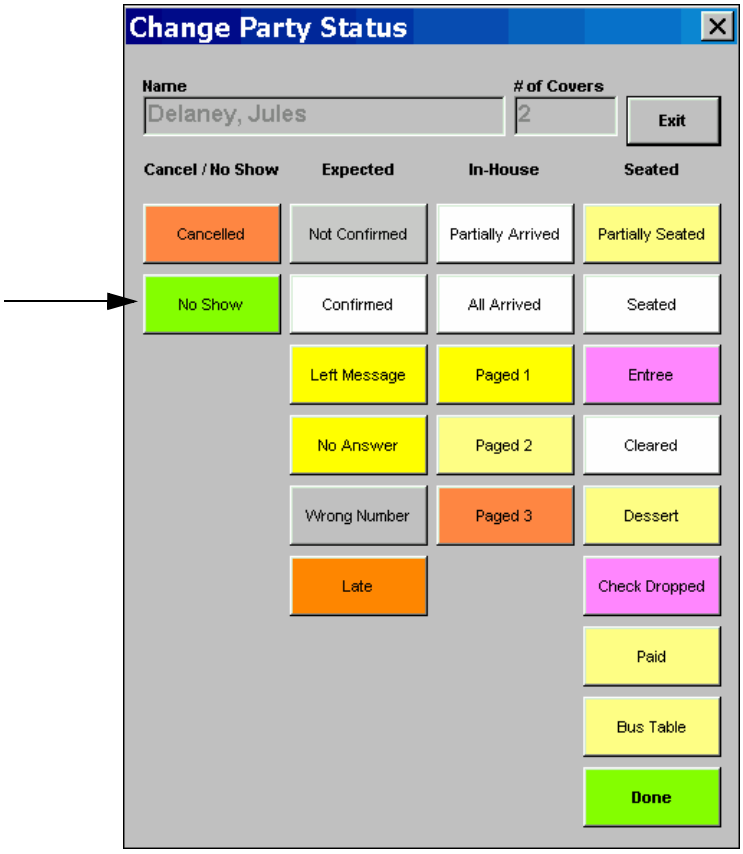


Figure 2-28: No Show Status on the Change Party Status Dialog

4. The system changes the status to *No Show* (the background color of the reservation also changes to the no show color configured in the system). The reservation is still visible on the *Sheet View, Book View*, and *Floor View*.

Changing the Status of a Reservation

To change the status of a reservation:

1. On the *Sheet View, Book View,* or *Floor View*, highlight the reservation you wish to change by tapping the reservation once (on the *Floor View*, you can also tap a table with a seated party).
2. Tap the **Status** button on the *Top Navigation Bar* to display the different status choices.

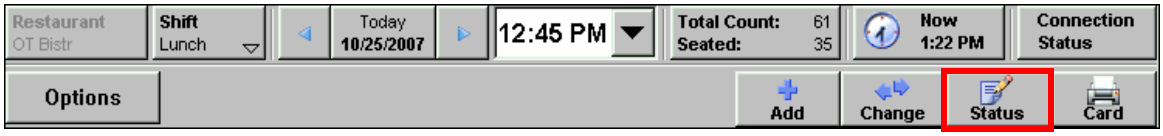


Figure 2-29: Status Button on the Top Navigation Bar

3. Tap the desired status. The status of the reservation is changed.

Some status changes are not allowed, depending on the current status and date.

Blocking a Reservation Slot

You can block reservation slots so that internal restaurant staff and web diners (people booking reservations via the web) are prevented from booking into these slots. Blocking slots can be useful if you have overbooked other slots. You can password protect the ability to unblock slots.

To block an empty slot:

1. On the *Sheet View, Book View*, or *Floor View*, tap an empty slot to highlight it.
2. Tap the **Change** button on the *Top Navigation Bar* to display the *Change Entry Dialog*.

Figure 2-30: Change Button on the Top Navigation Bar

3. Tap **Block Slot**. The system blocks the slot. The word "Blocked" appears in the name field to indicate that the slot is blocked and a "0" is displayed in the party size column.

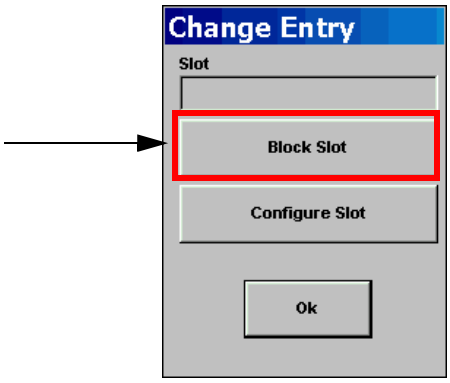


Figure 2-31: Block Slot Button on the Change Entry Dialog

4. You can enter the reason for the blocked slot by tapping the blocked slot and then tapping the *Reservation Notes Dialog* at the bottom of the view.

Unblocking a Reservation Slot

Users cannot book reservations into blocked slots. If you wish to make a reservation into a blocked slot, you must first unblock the slot and then immediately double-tap the slot to begin the make reservation process.

To unblock a slot:

1. On the *Sheet View, Book View*, or *Floor View*, tap the blocked slot to highlight it.
2. Tap the **Change** button on the *Top Navigation Bar* to display the *Change Entry Dialog*.

Figure 2-32: Change Button on the Top Navigation Bar

3. Tap **Unblock Slot**. If prompted, enter a password that has access to this area to continue.

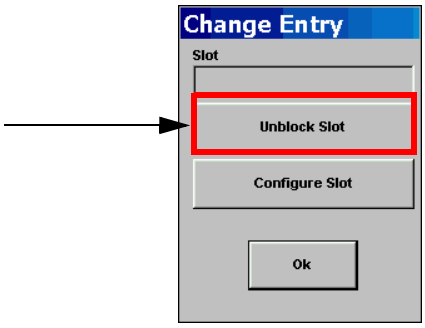


Figure 2-33: Unblock Slot Button on the Change Entry Dialog

Changing the Sort Order on the Sheet, Book, and Floor Views

The default sort order for the *Sheet View, Book View,* and *Floor View* is to sort the view by time, status, party size, and table number. You can change the sort order by tapping any of the column headings except for the *Notes* (N) column.

To change the sort order:

1. Navigate to the *Sheet View, Book View*, or *Floor View*.
2. Tap the column heading of the column you want to sort by (the Name column for example). The view re-sorts in ascending order by that column. The background of the column heading changes to a lighter shade of gray to indicate that the view is sorted by that column.
3. Tap the same column heading again. The view re-sorts in descending order by that column.
4. Tap the **Time** column to reset the sort order of the view to the default sort order. Note that depending on what you selected, the different views can be sorted in a different order.

The sort order for all views resets back to the default sort order when you close and restart the OpenTable system.

Chapter 3: Configuring Slots for One Shift

Maximizing the flexibility of the *OpenTable* electronic reservation book is one of the key ways that the *OpenTable* system can help restaurants increase business. The more accurately the reservation book reflects the available seat / table inventory in the dining room to restaurant users and web diners, the more reservations you can take and the more diners you can serve in a given period of time (in a 15 minute time increment, in a shift, in a day, etc.).

There are two main ways to configure slots in your reservation book:

- Using the *Add* and *Change* buttons on the *Top Navigation Bar* to add new slots or configure the settings of existing slots for a shift on one day. This is the fastest method and is designed to make one-time changes "on the fly" to one or a very small number of shifts directly from the *Sheet* or *Book Views.* This chapter covers this method of configuring slots.
- Using the *Schedules, Sheets, and Floor Layouts* button in the *Admin View* to add new slots or configure the settings of existing slots on reservation sheets assigned to multiple shifts. This method is best suited for making systematic and recurring changes. For example, you would use this method when you want to make changes to all your Friday dinner shifts. For more information, refer to "Managing Reservation Sheets Using the Sheets Tab" on page 82.

Types of Slots in the OpenTable System

There are three types of slots in the *OpenTable* system: *Standard Slots, Manager Slots,* and *Expiring Manager Slots* (a special type of *Manager Slot*).

Slot Type	Reserve from Web	Reserve from Restaurant	Requires Password	Appearance in the System
Standard	Yes	Yes	No	Blank
Manager	No	Yes	Optional	-- Mgr Slot --
Expiring Manager	No before time expires. Yes afterwards	Yes	Optional before time expires. No afterwards	-- Exp Mgr (X) --

Table 3-1: Types of Slots in the OpenTable System

Standard Slots appear as blank rows in your electronic reservation book. Any web diner or restaurant user can book reservations into *Standard Slots*. A majority of your electronic reservation book should be made up of *Standard Slots*.

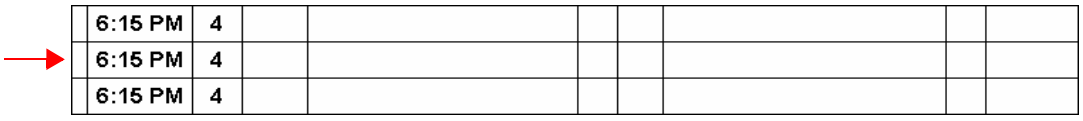


Figure 3-1: A Standard Slot on the Sheet View

Manager Slots appear as rows with "-- Mgr Slot --" in your electronic reservation book. Restaurants often configure the *OpenTable* system to prompt for a password when a restaurant user attempts to make a reservation into a *Manager Slot. Manager Slots* are NOT available for booking by web diners. Restaurants

primarily use *Manager Slots* to save a small number of slots for last minute reservations for VIPs and special guests.

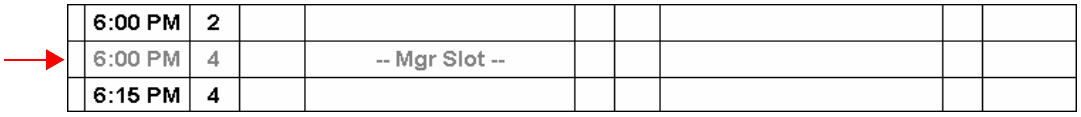


Figure 3-2: A Manager Slot on the Sheet View

Expiring Manager Slots appear as rows with "-- Exp Mgr (X) --" where "X" represents the configured expiration time. *Expiring Manager Slots* are a special type of *Manager Slot* that are configured to "expire" and automatically change to *Standard Slots* if they are still empty a few hours or days before the reservation is supposed to take place. You can configure *Expiring Manager Slots* to expire 1, 3, 6, 12, 24, 48, 72, and 96 hours before the reservation slot is supposed to take place. You can also configure *Manager Slots* to never expire. Before time expires, *Expiring Manager Slots* behave like *Manager Slots*. After time expires, they behave like *Standard Slots*.

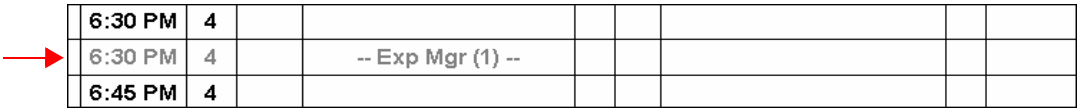


Figure 3-3: An (Unexpired) Expiring Manager Slot on the Sheet View

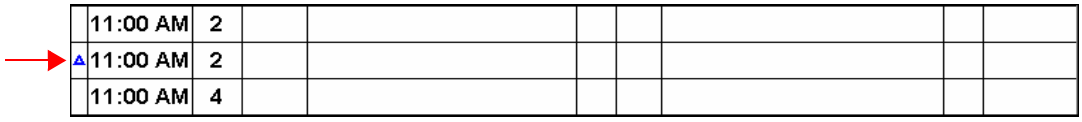


Figure 3-4: An (Expired) Expiring Manager Slot on the Sheet View

As an upcoming shift fills with reservations, the restaurant may want to make adjustments to the slot availability, including:

- Adding more slots.
- Changing the time or party size minimums and maximums of existing empty slots.
- Releasing *Manager Slots* for booking by web diners and the restaurant staff.

Typically, these changes are needed based on the expected flow of the shift and are intended to be applied to just one shift on one day and not for multiple shifts. All of these slot changes can be quickly implemented for the shift directly from within the main *OpenTable* system.

Inserting Empty Standard Slots

The *OpenTable* system allows users to insert empty *Standard Slots* into the reservation book "on the fly" for any shift that they navigate to in the *Sheet View, Book View*, or *Floor View / All Slots Tab.* You can password protect this capability in the *Admin View / Access Rights* area to maintain control of your book. All inserted slots are available to both restaurant users as well as web diners for reserving. There are visual indicators on the views that enable users to easily determine what slots have been inserted.

Inserting slots can overbook your restaurant. It is important to insert slots only when you are sure you can accommodate more guests during that time period.

The Insert Slot Dialog

When inserting slots, you will be working with the *Insert Slot Dialog*.

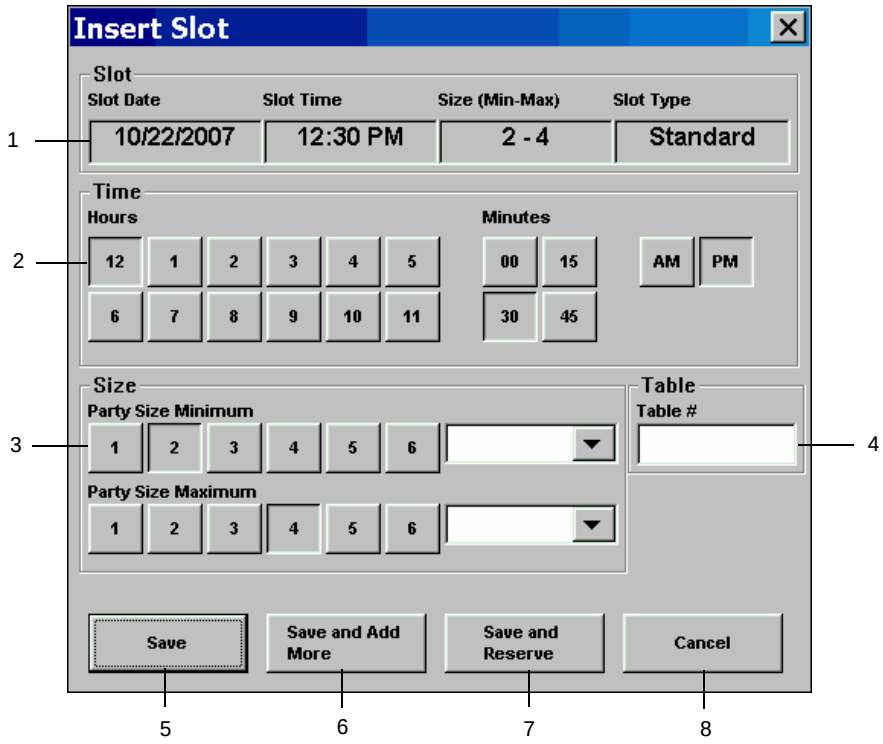


Figure 3-5: Insert Slot Dialog

1	Slot Settings	Date, time, party size, and slot type settings for this slot	5	Save	Inserts this new slot and returns to the previous view
2	Slot Time	Controls for setting the slot time	6	Save and Add More	Inserts this new slot and displays the Insert Slot Dialog to add more slots
3	Party Size Settings	Controls for setting the slot party size minimum and maximum	7	Save and Reserve	Immediately makes a new reservation into this new slot
4	Table #	Preassigned table number	8	Cancel	Cancel and return to the previous view

Inserting One Empty Standard Slot

To insert an empty *Standard Slot:*

1. Navigate to the desired date and shift on the *Sheet View, Book View,* or *Floor View / All Slots Tab* and tap the **Add** button on the *Top Navigation Bar.* If prompted, enter a password that has access to this area to continue.

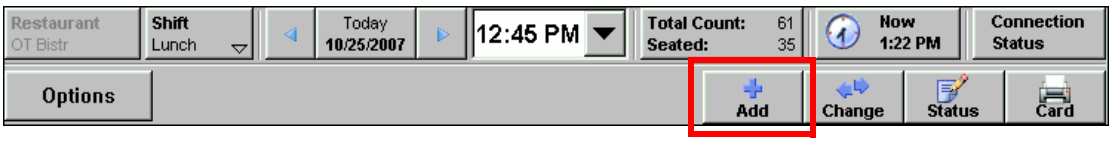


Figure 3-6: Add Button on the Top Navigation Bar

2. The system displays the *Insert Slot Dialog* with controls for configuring the slot settings, including time, minimum party size, maximum party size, and table number. Tap the appropriate controls on the *Insert Slot Dialog* to configure the slot time, party size minimum, and party size maximum. If desired, you can also enter a table number for the slot.

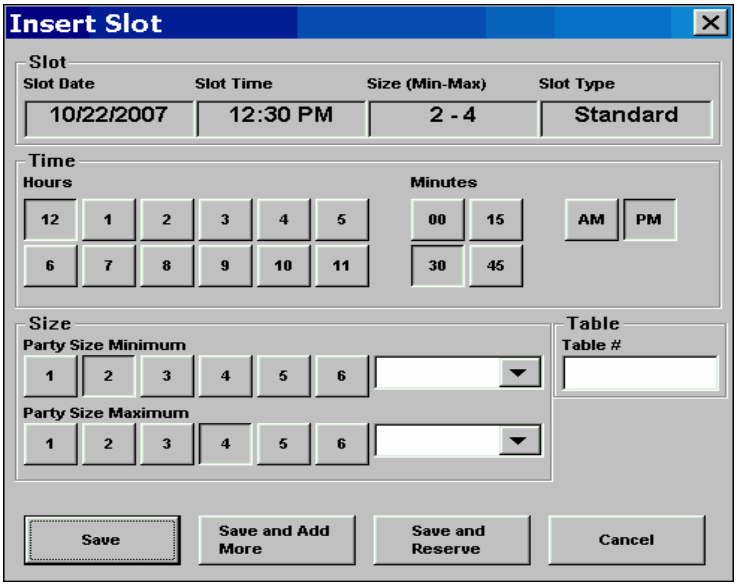


Figure 3-7: Insert Slot Dialog

The slot time of the slot must be no more than two hours earlier than the shift start time and no more than two hours later than the shift end time.

3. Tap the **Save** button at the bottom of the dialog.
4. The system saves the new slot and refreshes the view. The new slot continues to be highlighted and a solid red plus sign (+) is displayed in the "*" column to the left of the inserted slot to indicate that the slot was added to this shift.

After inserting and saving an empty slot, you can continue to make changes to the slot so long as it remains empty. Regardless of the number of subsequent changes, the system still considers it to be an inserted slot and will display the solid red plus sign (+) in the "" column.*

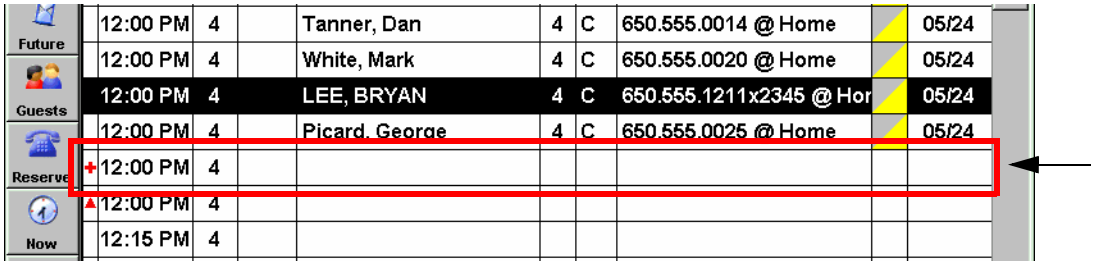


Figure 3-8: Sheet View with Inserted Slot

The new slot is inserted only for the selected shift on the selected day. If you look at the same shift on a future day (look for the solid red plus sign), the slot you just added does not appear.

Inserting Multiple Empty Standard Slots

To insert several empty *Standard Slots* with the same or similar characteristics:

1. Navigate to the desired date and shift on the *Sheet View, Book View,* or *Floor View / All Slots Tab* and tap the **Add** button on the *Top Navigation Bar*. If prompted, enter a password that has access to this area to continue.

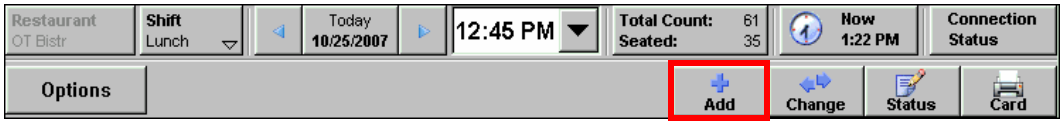


Figure 3-9: Add Button on the Top Navigation Bar

2. The system displays the *Insert Slot Dialog*. Tap the appropriate controls to configure the slot time, party size minimum, and party size maximum. If desired, you can also enter a table number for the slot.

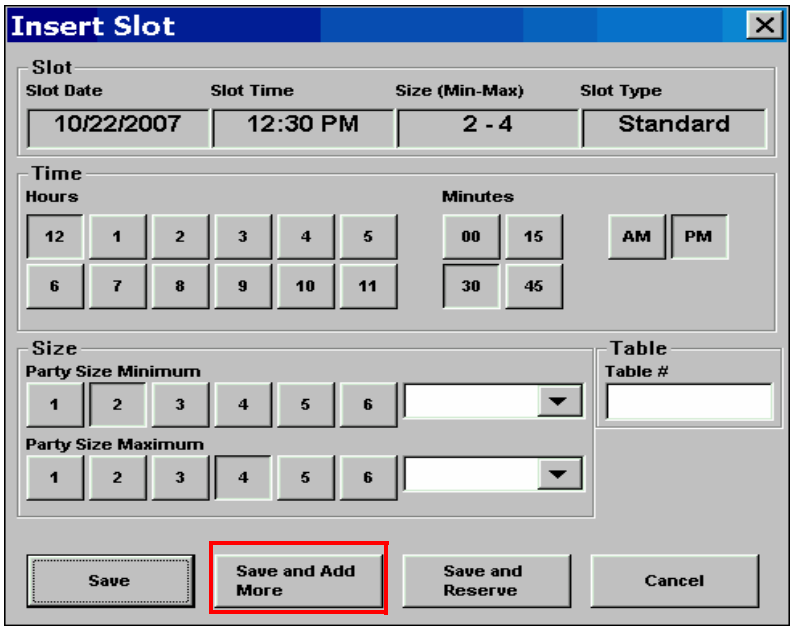


Figure 3-10: Insert Slot Dialog

3. Tap the **Save and Add More** button to insert the new reservation slot with your configuration settings
4. The system saves the new slot and refreshes the view. The new slot continues to be highlighted and a solid red plus sign (+) is displayed in the "*" column to the left of the inserted slot to indicate that the slot was added to this shift. The *Insert Slot Dialog* continues to be displayed with the settings you configured.
5. If you wish to add more slots with the same set of characteristics, simply tap the **Save and Add More** button and the system will add more slots with those same characteristics. You can also change the slot settings in the *Insert Slot Dialog* and tap the **Save and Add More** button.
6. When you are ready to add your last slot, tap the **Save** button to save the final slot.
7. The view is refreshed and the last slot is inserted into the reservation book and remains highlighted.

Inserting an Empty Standard Slot and Immediately Reserving the Slot

To insert an empty *Standard Slot* and to immediately make a reservation in the slot:

1. Navigate to the desired date and shift on the *Sheet View, Book View,* or *Floor View / All Slots Tab* and tap the **Add** button on the *Top Navigation Bar*. If prompted, enter a password that has access to this area to continue.

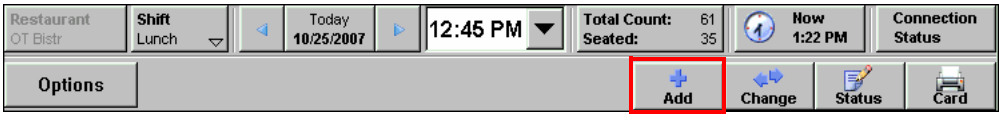


Figure 3-11: Add Button on the Top Navigation Bar

2. The system displays the *Insert Slot Dialog*. Tap the appropriate controls to configure the slot time, party size minimum, and party size maximum. If desired, you can also enter a table number for the slot.

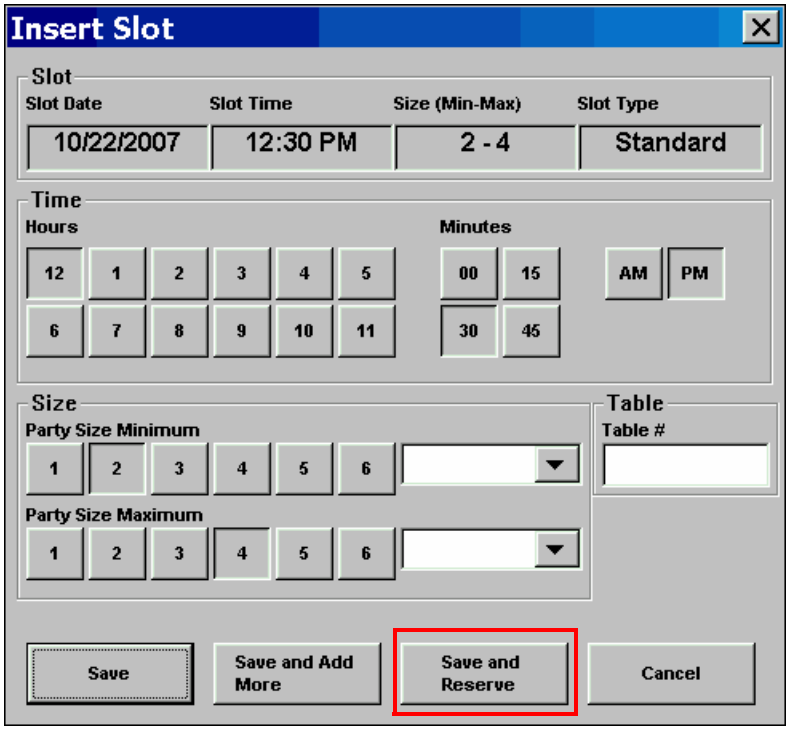


Figure 3-12: Insert Slot Dialog

3. Tap the **Save and Reserve** button to begin making a reservation into this slot.
4. The system displays the *Guest Identification Dialog*. Continue with the usual process for making a reservation and save the new reservation.
5. The view is refreshed and the reservation is made into the newly inserted slot in the reservation book. The system highlights the reservation you just made and the new slot has a solid red plus sign (+) displayed in the "*" column to the left of the inserted slot to indicate that the slot was added to this shift.

Deleting Empty Inserted Slots

Users can delete any empty inserted slots that are not needed for a shift. Inserted slots are identified by a solid red plus sign in the * column to the left of the slot.

To delete an empty inserted slot:

1. Navigate to the desired date and shift on the *Sheet View, Book View,* or *Floor View / All Slots Tab.*
2. Tap the empty slot that you want to delete. The slot is highlighted. The slot must be an empty inserted slot (has a solid red plus sign in the * column).
3. Tap the **Change** button on the *Top Navigation Bar* to display the *Change Entry Dialog*.

Figure 3-13: Change Button on the Top Navigation Bar

4. Tap the **Configure Slot** button on the *Change Entry Dialog*. If prompted, enter a password that has access to this area to continue.
5. In the *Configure Slot Dialog,* tap the **Delete Slot** button at the bottom. The system displays a confirmation dialog.
6. Tap **Yes**. If prompted, enter a password that has access to this area to continue.

*You can only delete inserted empty Standard Slots, which are identified by a solid red plus sign (+) in the * column.*

Configuring Empty Standard Slots

The *OpenTable* system allows users to configure the settings for any empty slot. You can password protect this capability to maintain control of your book. There are visual indicators on the views that enable users to easily determine what slots have been changed.

The Configure Slot Dialog for Standard Slots

Users can use the *Configure Slot Dialog* to configure the time, party size, and table number settings for the slot.

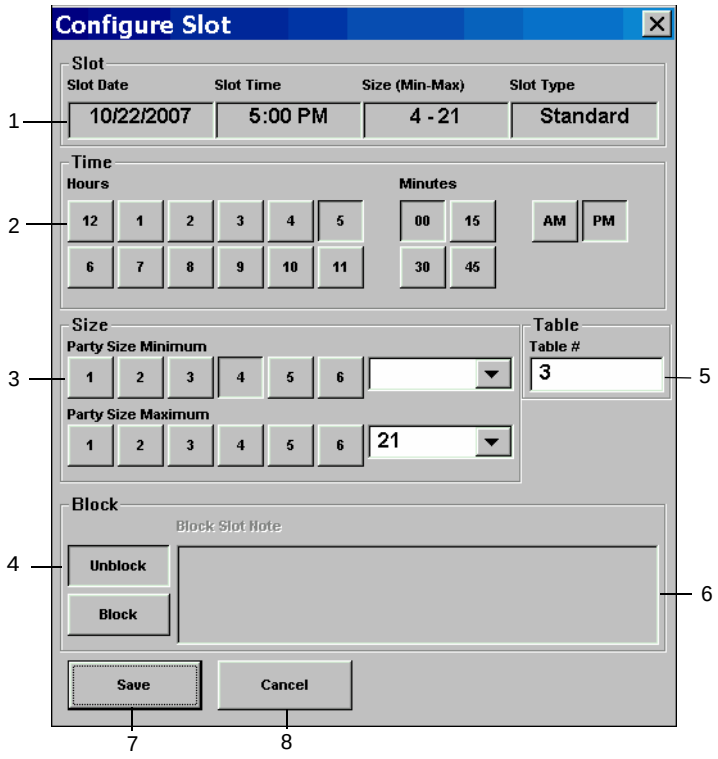


Figure 3-14: Configure Slot Dialog for Standard Slots

1	Slot Settings	Date, time, party size, and slot type settings for this slot	5	Table #	Preassigned table number
2	Slot Time	Controls for setting the slot time	6	Block Slot Note	Enter a note if you are blocking this slot
3	Party Size Settings	Controls for setting the slot party size minimum and maximum	7	Save	Save the settings changes for this slot
4	Unblock / Block	Unblocks or blocks this slot	8	Cancel	Cancel and return to the previous view

Configuring an Empty Standard Slot

To configure an empty *Standard Slot:*

1. Navigate to the desired shift on the *Sheet View, Book View,* or *Floor View / All Slots Tab.*
2. Tap the empty slot that you want to configure. The slot is highlighted. The slot can be any type of slot (*Standard Slot, Manager Slot, Expiring Manager Slot, Blocked slot*) but it must be an empty slot.
3. Tap the **Change** button on the *Top Navigation Bar* to display the *Change Entry Dialog*.

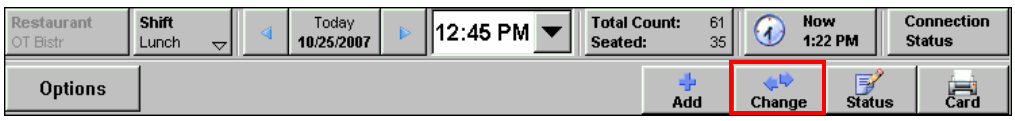


Figure 3-15: Change Button on the Top Navigation Bar

4. Tap the **Configure Slot** button on the *Change Entry Dialog.* If prompted, enter a password that has access to this area to continue. The system locks the slot while you are configuring it and displays "-- In Progress --" in the *Name* field. This prevents other users from trying to make a reservation in the slot while you are changing it.
5. In the *Configure Slot Dialog,* configure the slot time, party size minimum, and party size maximum. If desired, you can also enter a table number for the slot and block or unblock the slot.

The slot time of the slot must be no more than two hours earlier than the shift start time and no more than two hours later than the shift end time.

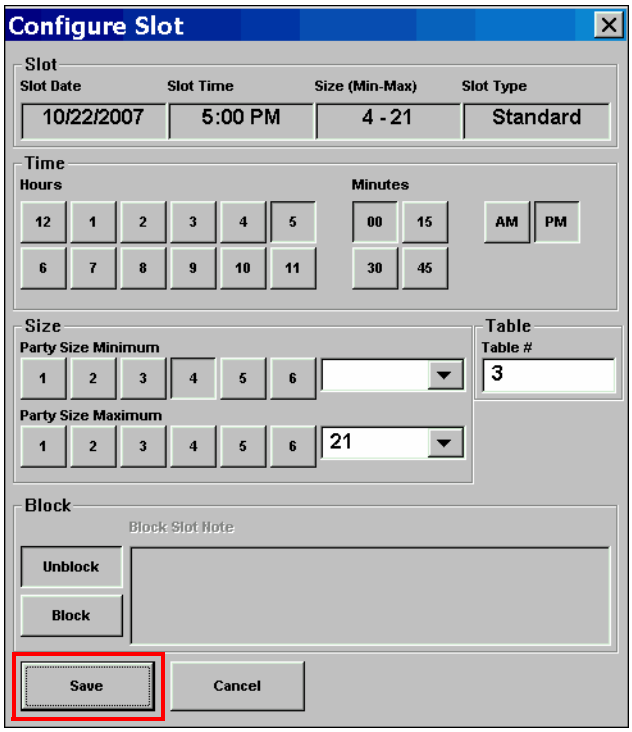


Figure 3-16: Configure Slot Dialog for Standard Slots

6. Tap the **Save** button at the bottom of the dialog to save your configuration settings.
7. The view is refreshed and the changed slot remains highlighted with a solid red triangle displayed in the "*" column to the left of the slot, indicating that the slot was changed.

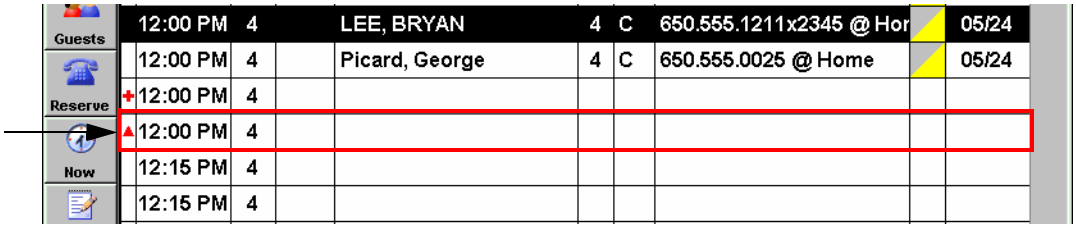


Figure 3-17: Sheet View with Changed Slot

If you are using a mouse, you can right-click the slot that you want to work with to highlight it and immediately display the Change Entry Dialog.

Configuring Empty Inserted Slots

The steps to configure empty inserted *Standard Slots* that were inserted "on the fly" are exactly the same as configuring existing empty *Standard Slots* with two minor differences in the user interface:

- The indicator to the left of the inserted slot continues to be a solid red sign (+) to make it clear that the slot was inserted. You can configure and change the settings of an empty inserted *Standard Slot* several times and the indicator will continue to be a solid red plus sign (+).
- The *Configure Slot Dialog* will display an additional button: the *Delete Slot* button. This button allows you to delete the empty inserted slot.

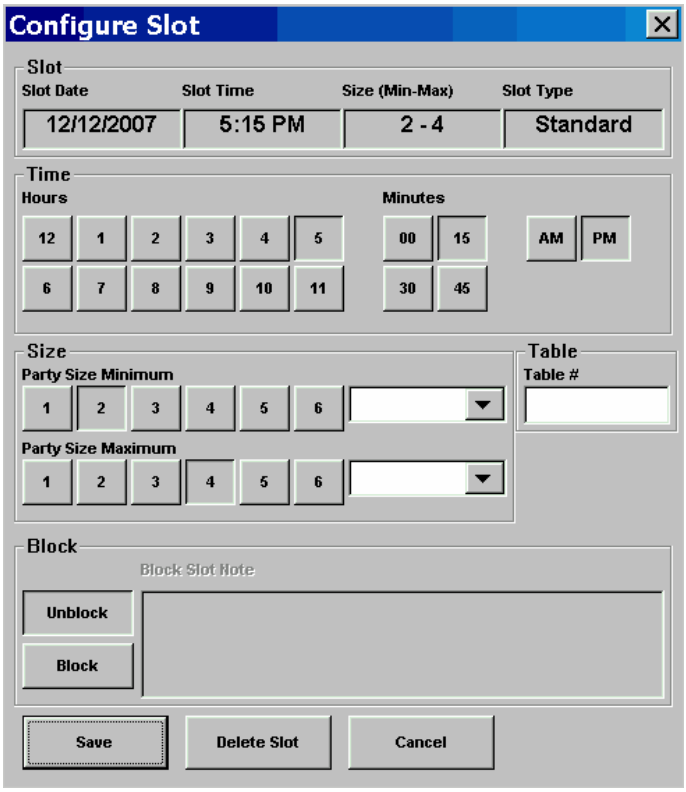


Figure 3-18: Configure Slot Dialog for Inserted Standard Slots

Only Inserted Slots can be deleted from the book. In order to delete all other slots, including Standard Slots, Manager Slots, and Expiring Manager Slots, you must use the Sheets, Floor Lay-outs, Schedules button in the Admin View to delete slots from the appropriate reservation sheets.

Restoring Changed Slot Settings

Users can restore the original slot settings for any empty changed slots. Changed slots are identified by a red or blue triangle in the "*" column to the left of the slot.

To restore the original settings for a changed slot:

1. Navigate to the desired shift on the *Sheet View, Book View,* or *Floor View / All Slots Tab.*
2. Tap the empty slot that you want to restore. The slot is highlighted. The slot must be an empty changed slot (has a red or blue triangle in the "*" column).

3. Tap the **Change** button on the *Top Navigation Bar.*

Figure 3-19: Change Button on the Top Navigation Bar

4. Tap the **Configure Slot** button on the *Change Entry Dialog.* If prompted, enter a password that has access to this area to continue.
5. Tap the **Restore** button at the bottom of the *Configure Slot Dialog*.

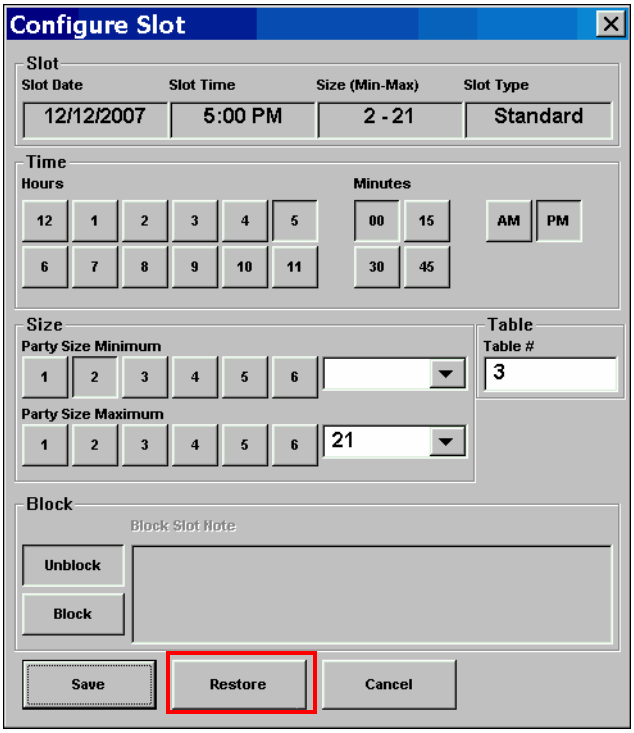


Figure 3-20: Configure Slot Dialog for Changed Standard Slots

6. The system restores the original slot settings and refreshes the view. The restored slot continues to be highlighted and the "*" column to the left of the slot is empty.

You can also restore the original settings for any empty Manager Slots following the steps outlined above. If the Manager Slot was expired, restoring the slot will "unexpire" the slot and recalculate the slot's expiration time. If the expiration time has already passed, the system will expire the slot within one minute.

Configuring Empty Manager Slots

The steps to configure empty *Manager Slots* are identical to the steps for configuring empty *Standard Slots*. However, there are some additional settings that you can configure for *Manager Slots*:

- The *Configure Slot Dialog* allows users to change the number of hours before the *Manager Slot* automatically expires and becomes a *Standard Slot*.

- The *Configure Slot Dialog* allows users to expire the *Manager Slot* immediately and change it into a *Standard Slot*.
- If any changes are made to a *Manager Slot*, a solid blue triangle is displayed in the "*" column to the left of the slot to indicate that the slot was changed.
- If a *Manager Slot* is expired and turns into a *Standard Slot*, an empty blue triangle is displayed in the "*" column next to the slot to indicate that the slot has expired.

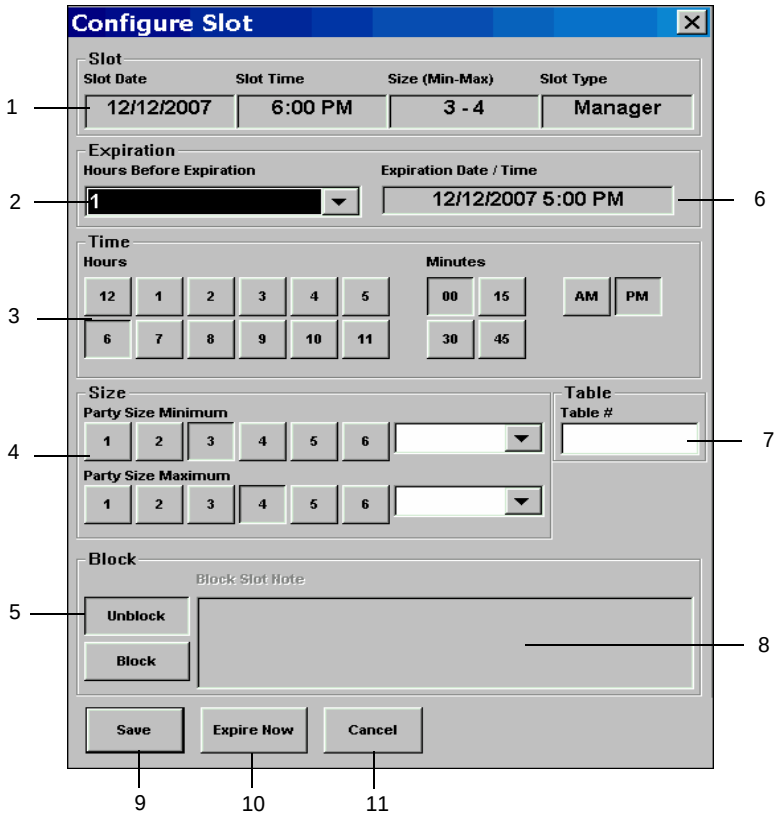


Figure 3-21: Configure Slot Dialog for Manager Slots

1	Slot Settings	Date, time, party size, and slot type settings for this slot	7	Table #	Preassigned table number
2	Hours Before Expiration	Set the time for the Manager Slot to Expire	8	Block Slot Note	Enter a note if you are blocking this slot
3	Slot Time	Controls for setting the slot time	9	Save	Saves the settings changes for this slot
4	Party Size Settings	Controls for setting the slot party size minimum and maximum	10	Expire Now	Expires Manager Slot now
5	Unblock / Block	Unblocks or blocks this slot	11	Cancel	Cancel and return to the previous view
6	Expiration Date and Time	When the slot will Expire and change to a Standard Slot			

You can password protect various slot configuration capabilities, including the ability to: Unblock Slots, Insert Reservations, Insert Standard Slots, Delete Inserted Slots, Configure Standard Slots, and Configure Manager Slots.

Configuring the Expiration Time for Manager Slots

The goal of *Expiring Manager Slots* is to give you greater control over your seat / table inventory and allow you to open up slots for booking by restaurant users and web diners. As described in previous sections, *Manager Slots* are primarily used to save a small # of slots for VIPs and special guests. *Manager Slots* are more restrictive than *Standard Slots. Manager Slots* cannot be booked by web diners and they often require restaurant users to enter a valid password in order to book them. Depending on the operational flow of the restaurant, you have the flexibility to configure the system to automatically change *Manager Slots* into *Standard Slots* by setting an expiration time for the *Manager Slots*.

Let us review an *Expiring Manager Slot* example. Assume that an empty *Manager Slot* is configured to take place at 7:30pm on a Thursday dinner shift and has an expiration time of 6 hours. The slot continues to have all the characteristics of a *Manager Slot* prior to Thursday at 1:30pm (6 hours before the slot is scheduled to take place). If the *Manager Slot* is still not booked by Thursday at 1:30pm, the system automatically expires the *Manager Slot* and changes it to a *Standard Slot*. This releases the slot and makes it available for booking by web diners and restaurant users (without requiring a password).

To configure the expiration time for *Manager Slots:*

1. Navigate to the desired shift on the *Sheet View, Book View,* or *Floor View / All Slots Tab.*
2. Tap the empty **Manager Slot** that you want to change. The slot is highlighted.
3. Tap the **Change** button on the *Top Navigation Bar.*

Figure 3-22: Change Button on the Top Navigation Bar

4. Tap the **Configure Slot** button on the *Change Entry Dialog*. If prompted, enter a password that has access to this area to continue.
5. Tap the **Hours Before Expiration Dropdown** at the top of the *Configure Slot Dialog* and select the # of hours. You can configure the *Manager Slot* to expire and become a *Standard Slot* 1, 3, 6, 12, 24, 48, 72, or 96 hours (4 days) before the reservation slot is supposed to take place. You can also configure *Manager Slots* to never expire.
6. Tap the **Save** button.
7. The system saves the configuration changes and refreshes the view. The changed slot continues to be highlighted and a solid blue triangle is displayed in the "*" column to the left of the slot to indicate that the slot has changed. The Name field contains "-- Exp Mgr (X) --" where X is the number of hours before expiration. If you configured the *Manager Slot* to never expire, then the Name field contains "-- Mgr Slot --".

*An easy way to see all the inserted and changed slots within a shift is to tap the * column on the Sheet View, Book View, or Floor View / All Slots Tab. All the inserted and changed slots will sort to the top of the view. Tap the Time column to reset the view to the default sort order.*

Immediately Expiring a Manager Slot

To immediately expire a *Manager Slot:*

1. Navigate to the desired shift on the *Sheet View, Book View,* or *Floor View / All Slots Tab.*
2. Tap the empty **Manager Slot** that you want to expire. The slot is highlighted.
3. Tap the **Change** button on the *Top Navigation Bar.*

4. Tap the **Expire Now** button on the *Change Entry Dialog*. If prompted, enter a password that has access to this area to continue.
5. The system expires the *Manager Slot* and refreshes the view. The expired slot continues to be highlighted and an empty blue triangle is displayed in the *"*"* column to the left of the slot to indicate that the slot has expired. The *Name* field is blank.
6. *Expiring Manager Slots* that have expired appear as blank rows with an empty blue triangle indicator to the left of the row in the "*" column.

If you are configuring the Manager Slot settings in the Change Entry Dialog, you can tap the Expire Now button at the bottom of the dialog to expire the slot immediately.

Making Reservations Into Inserted or Changed Slots

Making reservations into inserted or changed slots is exactly the same as making reservations into any other slot and follows the same rules as making reservations into any *Standard Slot* or *Manager Slot.* The only difference is the indicator that is displayed in the "*" column to the left of the inserted or changed slot will display a plus sign (+) or triangle.

Slot Indicators

The "*" column on the left side of the *Sheet View, Book View,* and *Floor View* contains visual indicators that identify slots that have been inserted or changed. The table below summarizes the different definitions of the indicators.

Indicator	Description
Solid Red Plus Sign	*Standard Slot* was inserted into the shift.
Solid Blue Plus Sign	*Manager Slot* was inserted into the shift.
Solid Red Triangle	*Standard Slot* was changed in some way (time, party size, table #, slot was blocked).
Solid Blue Triangle	*Manager Slot* was changed in some way (time, party size, table #, slot was blocked).
Empty Blue Triangle	*Expiring Manager Slot* or *Manager Slot* has expired and has changed into a *Standard Slot*. The slot may have been expired automatically by the system or manually by a user.

Table 3-2: Slot Indicators

Chapter 4: Party Status

Status Choices

You can use the *Status* button on the *Top Navigation Bar* to change the status of a highlighted reservation on the *Sheet View, Book View*, and *Floor View* or the highlighted waitlist party on the *In-House Waitlist View* and *Floor View/Active Waitlist* tab. There are four status categories:

- *Cancel / No Show* - used to cancel or no show parties. These parties are NOT expected to come in.
- *Expected* - used to manage parties that are expected to come in but are not yet in the restaurant.
- *In-House* - used when parties are in the restaurant and waiting to be seated.
- *Seated* - used to manage parties when they are seated at a table. The *Done* status is a special Seated status that indicates that parties are done with their meal, have left the table, and the table is set and ready for the next party.

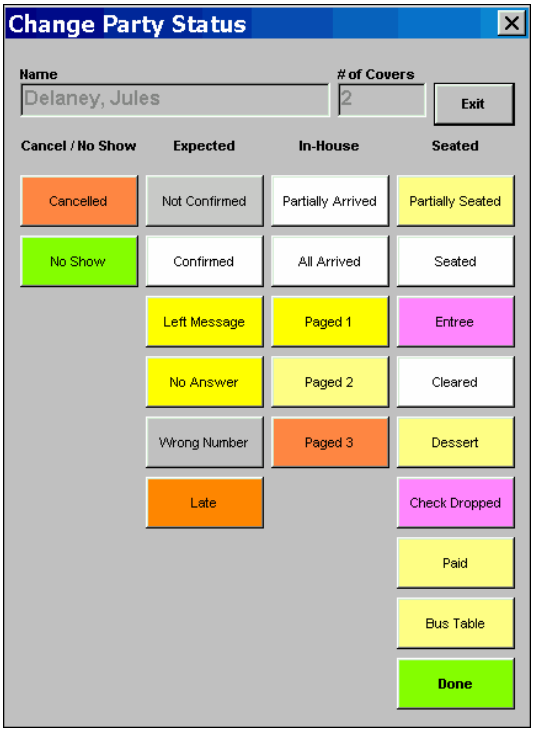


Figure 4-1: Change Party Status Dialog

Using OpenTable Statuses

1. In the *Sheet View, Book View,* or *Floor View*, tap a reservation to highlight it and tap the **Status** button on the *Top Navigation Bar.*

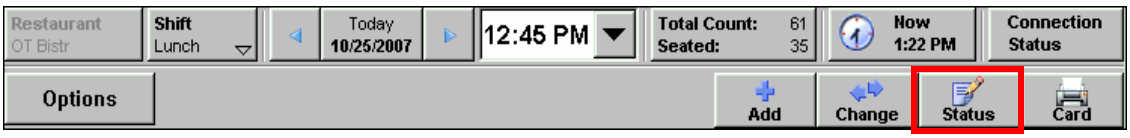


Figure 4-2: Status Button on the Top Navigation Bar

2. The system displays the *Change Party Status Dialog.* The reservation's current status is in bold type. Tap the desired status for the reservation.
3. The reservation will change to the corresponding status color (tap a different reservation to see the background color change). If you are on the *Sheet View*, the *ST (Status) Column* will change to the status code for the new status.

Be sure to mark your cancellations and no shows with the appropriate status to accurately reflect guest dining history and ensure accurate reporting and billing.

Notes

You can access the *Change Party Status Dialog* in several ways:

- On the *Floor View*, double-tap a table with a seated party.
- On the *Sheet View*, double-tap the *ST (Status) Column* for the desired reservation.
- On the *Sheet View, Book View,* or *Floor View*, highlight the desired reservation and tap **Status**. button on the *Top Navigation Bar.*

Configure your status colors to establish your own color scheme. Consider a color coding scheme of reds (Cancel Party, No Show, etc.), yellows (No Answer, Not Confirmed, etc.), and greens (Confirmed, etc.) that can be recognized at a quick glance.

Suggested Seating Order

The *Partially Arrived* and *All Arrived* statuses help you recognize and track the order of arrivals. When you change the status of a party to *Partially Arrived* or *All Arrived*, the system notes and displays the party's arrival time on the *Floor View* and displays a suggested seating order number (1, 2, 3, etc.) in the *PR (Priority) Column* to indicate who should be seated first.

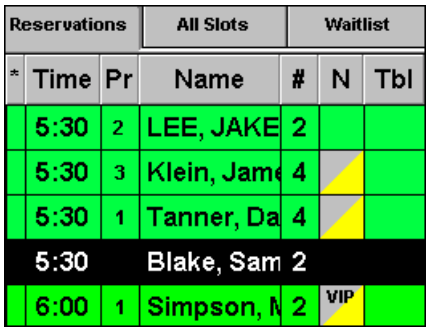

Reservations
All Slots
Waitlist
* Time Pr Name # N Tbl
5:30 2 LEE, JAKE 2
5:30 3 Klein, Jame 4
5:30 1 Tanner, Da 4
5:30 Blake, Sam 2
6:00 1 Simpson, N 2 VIP

Figure 4-3: Suggested Seating Order on the Floor View / Reservations Tab

Changing the status of the party to any status other than *Partially Arrived or All Arrived* removes the party from the seating priority calculation and re-orders the remaining *Partially Arrived or All Arrived* parties. You can configure how the system establishes the suggested seating order in the *Admin View / Floor Management Settings* area. For more information, refer to "Floor Management Settings" on page 147.

Once you have configured your options, the system establishes the suggested seating order according to the following criteria:

- Status - *All Arrived* parties are prioritized before *Partially Arrived* parties. Parties with any other statuses are not considered and the *PR (Priority) Column* is blank.
- Arrival time - Parties with the same status (*All Arrived or Partially Arrived*) are prioritized based on which party was marked *All Arrived* first.

Chapter 5: In-House Waitlist View

The *In-House Waitlist View* allows you to manage a guest waitlist for one of today's shifts. You can access this view by tapping the *Waitlist* button on the *Side Navigation Bar*. This view is an expanded, more feature-rich, full screen version of the *Active Waitlist* on the *Floor View*. For more information, refer to "Active Waitlist" on page 63. The *In-House Waitlist View* and the *Active Waitlist* are different views / presentations of the same guest data, but the *In-House Waitlist View* displays more information and has more features.

Use the *Active Waitlist* if you prefer to see both the *Floor View* and the waitlist on one screen and/or you are used to the way the waitlist works from prior versions of the software.

Use the *In-House Waitlist View* to see more information about each party, including an indicator for parties that are past their quoted wait time, Pager ID (if applicable), dining preferences, notes, and mobile phone number.

Using the In-House Waitlist View

The *In-House Waitlist View* is designed to let users see a great deal of information about all waiting parties at a glance for one of today's shifts (this waitlist cannot be used for shifts on previous or future days). Whenever there is a waiting party on the list, the color of the hourglass on the *In-House Waitlist View* button on the *Side Navigation Bar* changes to red and an exclamation point "!" is added to the button.

Figure 5-1: In-House Waitlist Button on the Side Navigation Bar

Each row in the *In-House Waitlist View* represents a waiting party and displays the following information about the selected party:

- Arrival Time
- Quoted Time
- Guest Name
- Party Size
- Guest Recognition Codes
- Pre-Assigned Table #
- Party Status
- Pager ID *
- Dining Preferences *
- Reservation Notes

* The *Pager ID* and *Dining Preferences* are optional display fields and can be configured by tapping the **Admin View / Floor Management Settings** button. You can select up to four reservation codes as your dining preferences.

When you tap one of the waiting parties, the bottom panel of the view displays more detailed information about the selected party, including:

- Reservation Notes and Codes
- Guest Notes and Codes (if the guest was selected from the guest database)
- Time stamps of several party status changes
- The guest's mobile phone #

This bottom panel is hidden when the waitlist has no waiting parties. The lower right portion of the bottom panel displays the waiting party count and waiting cover count along with several controls that allow you to generate a waitlist report, no show or seat the selected party, or add a new waitlist party.

Features of the In-House Waitlist View

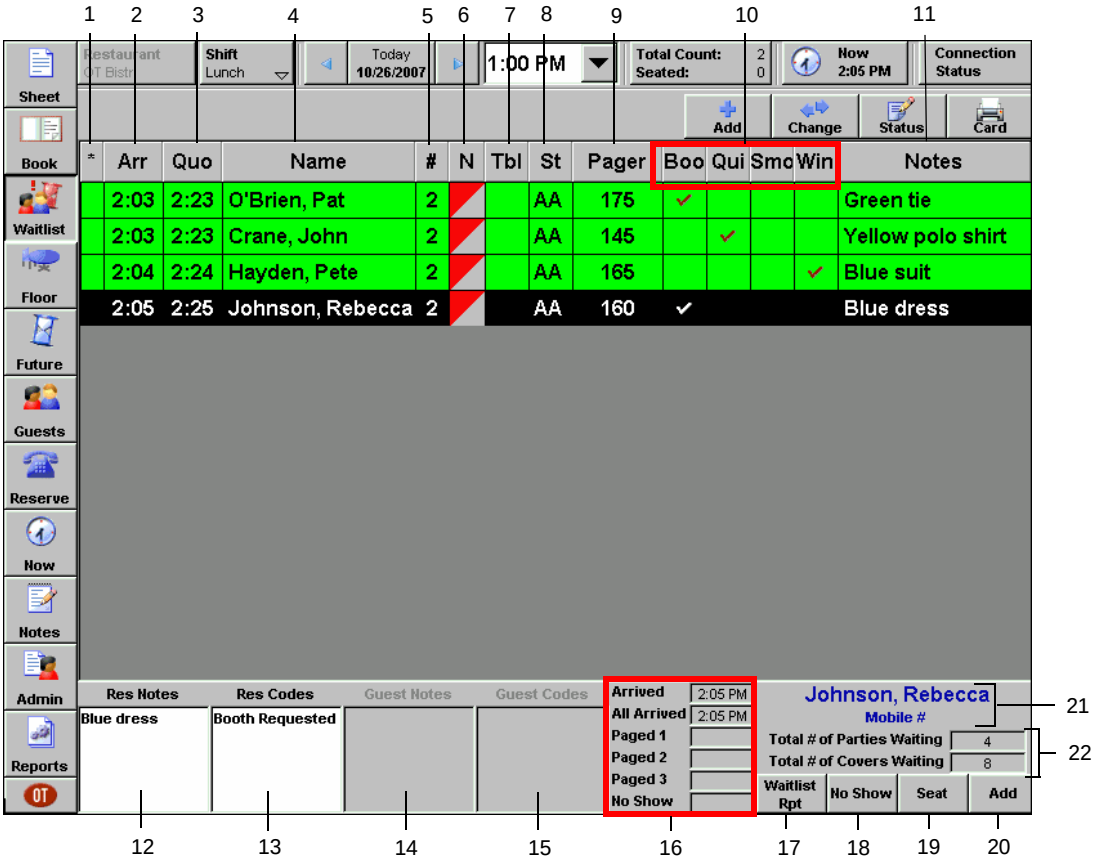


Figure 5-2: In-House Waitlist View

1	*	An "X" indicates that the quoted time has passed for the guest	11/12	Res Notes	Preferences, special requests, and comments for this party
2	Arr	Time guest arrived / checked in	13	Res Codes	Reservation Codes for this party (selected Preferences 1-4 display here)
3	Quo	Time quoted to the guest	14	Guest Notes	Guest preferences and comments
4	Name	Name of the waiting guest	15	Guest Codes	Guest Codes for this guest
5	Size (#)	# of people in the waiting party	16	Party Status Time Stamps	Shows time stamps of the status changes for the highlighted party
6	Notes (N)	Red = Reservation Note / Code Yellow = Guest Note / Code	17	Waitlist Rpt	Immediately run the waitlist report with the default settings
		Guest Recognition Codes appear in this column	18	No Show	Change the status of the waiting party to "No Show"
7	Table (Tbl)	Pre-assigned table number	19	Seat	Seat the highlighted party on the floor (switches view to the Floor View)
8	Status (St)	Waitlist status (background color also indicates the status)	20	Add	Add a new waitlist entry
9	Pager	Pager ID of the pager given to the guest (optional)	21	Mobile #	Guest's name and mobile phone number
10	Preferences 1-4	Configurable dining or table preferences (optional)	22	Total Counts	Count of # of parties and people waiting for a table

Features of the Add / Edit Waitlist Party Dialog

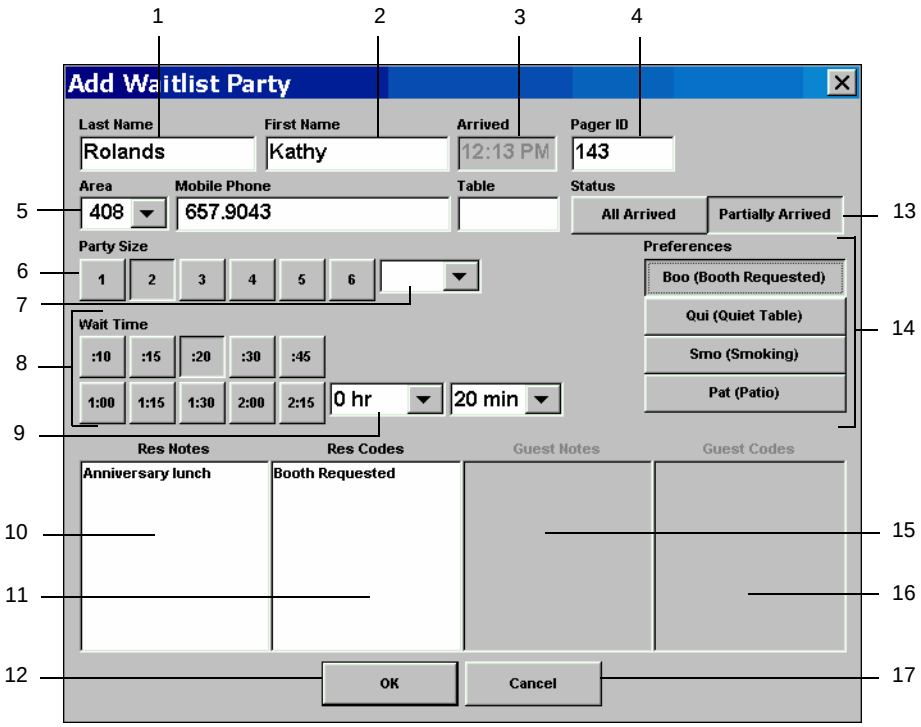


Figure 5-3: Add / Edit Waitlist Party Dialog

1	Last Name	Guest's last name	10	Res Notes	Preferences, special requests, and comments for this entry only
2	First Name	Guest's first name	11	Res Codes	Reservation Codes for this entry only
3	Arrived	Time guest arrived and was added to the waitlist	12	OK	Saves the waitlist entry
4	Pager ID	Pager # if restaurant uses pagers. This field can be hidden	13	Status	Set party status to Partially Arrived or All Arrived (displays for new entries)
5	Mobile Phone	Guest's mobile phone #	14	Preferences	Up to four configurable (and optional) dining preferences selected from the list of Reservation Codes
6	Party Size	# of diners in the party	15	Guest Notes	Guest preferences and comments for this guest (active only if guest is selected from the database)
7	Party Size Drop-down	Select or enter a party size greater than 6	16	Guest Codes	Guest Codes for this guest (active if guest is selected from the database)
8	Wait Time (1)	Wait time quoted to the guest	17	Cancel	Discards any changes to the entry
9	Wait Time (2)	Enter a custom wait time			

Adding a New Waitlist Party

To add a new Waitlist Party:

1. Tap the *Waitlist* button on the *Side Navigation Bar* to see the *In-House Waitlist View*. You can also tap the *Floor View* button on the *Side Navigation Bar* and tap the *Waitlist Tab* on the far right to launch the *Active Waitlist*.

2. Tap the **Add** button on the *Top Navigation Bar*.

Figure 5-4: Add Button on the Top Navigation Bar

3. From the *In-House Waitlist View*, you can also tap the **Add** button in the lower left portion of the view if there is at least one waitlist entry. The *Add Waitlist Party Dialog* is displayed.

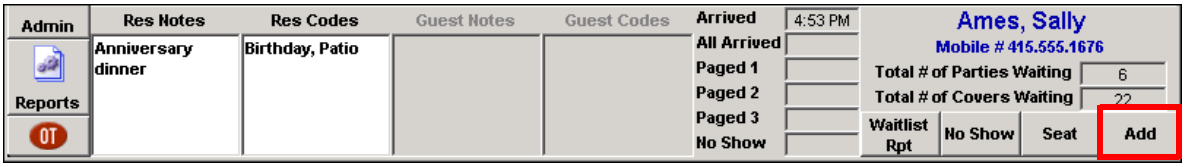


Figure 5-5: Add Button on the In-House Waitlist

4. Depending on your configuration, the system will prompt you to search the guest database for an existing guest or type in a single-use guest name (you must enter either a first or last name). Preferences are configured in the *Admin View / Floor Management Settings / Waitlist Settings Tab* (for more information, refer to "Waitlist Settings Tab" on page 153. Select the appropriate party size and quoted wait time (both must be > 0).
5. If configured, tap any of the **Preference** buttons to set dining preferences for the party.
6. Add any notes (guest description, special requests, etc.).
7. Set the party status by tapping the **Partially Arrived** or **All Arrived** button and tap **OK**. The party is added to both the *In-House Waitlist View* and the *Active Waitlist*.

Editing an Existing Waitlist Party

To edit an existing waitlist party:

1. From the *In-House Waitlist View* or the *Floor View | Active Waitlist Tab,* find and double-tap the waitlist party that you want to edit. The *Edit Waitlist Party Dialog* is displayed.
2. Make your desired changes and tap **OK**. The changes are saved.

Assigning Dining Preferences for a Waitlist Party

You can select up to four reservation codes and make them selectable dining preferences for the waitlist. These dining preferences are displayed as *Preference* buttons on the *Add Waitlist Party Dialog* and *Edit Waitlist Party Dialog* and as columns in the *In-House Waitlist View*. These preferences might be requests for a certain type of table like a window or a request for a specific dining room.

To assign dining preferences to a party:

1. Create a new entry or edit an existing entry for the party. On the *Add Waitlist Party Dialog* or *Edit Waitlist Party Dialog*, look at the right side of the dialog.

2. If you have *Preferences* configured, up to four *Preference* buttons will be displayed and labeled with its abbreviation and description. Tap the desired **Preference** button to assign it to the party. The button will be depressed and the associated reservation code will appear in the *Res Codes* field.

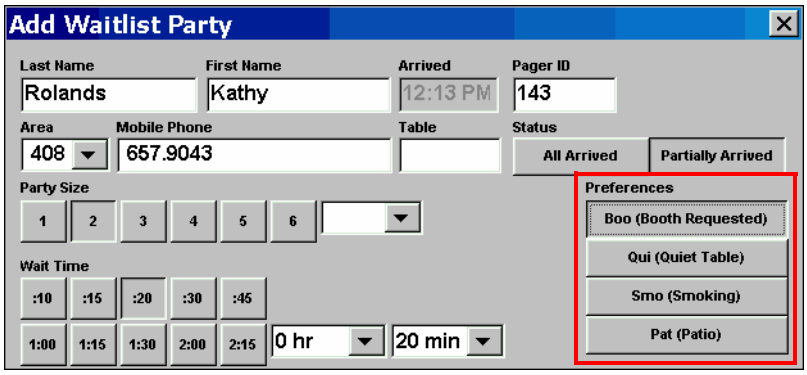


Figure 5-6: Setting Preferences in the Add / Edit Waitlist Party Dialog

3. If you tap one of the depressed **Preference** buttons again, the preference will be unselected and the Reservation Code will disappear from the *Res Codes* field.
4. Tap the **OK** button to save your changes. The *In-House Waitlist View* is displayed. The party you edited is selected and a checkmark appears in the appropriate *Preference* column for all selected preferences.

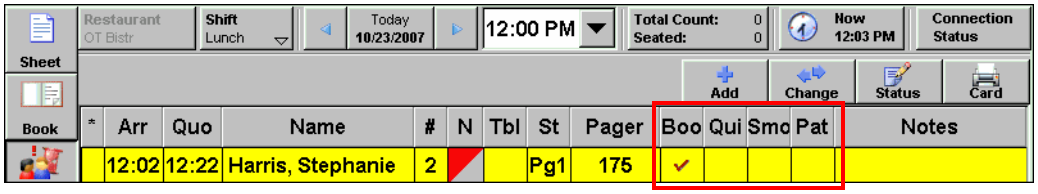


Figure 5-7: Preferences on the In-House Waitlist View

Changing the Status of a Waitlist Party

To change the status of a waitlist party:

1. From the *In-House Waitlist View* or the *Active Waitlist*, find and tap the desired waitlist party.
2. Tap the **Status** button on the *Top Navigation Bar* to display the different status choices.

Figure 5-8: Status Button on the Top Navigation Bar

3. Tap the desired status. The status is changed in the "St" column on the *In-House Waitlist View* and *Active Waitlist*. The background color of the party listing also changes to the appropriate color for that status on both views.

No Showing a Waitlist Party

If a guest does not check in with the host staff after repeated pagings and calls, you can change the status of the party to No Show. No Show waitlist parties will continue to be visible on the *In-House Waitlist View* in case the party eventually checks in. To No Show a waitlist party:

1. From the *In-House Waitlist View* or the *Active Waitlist*, find and tap the desired waitlist party.
2. Tap the **Status** button on the *Top Navigation Bar* to display the different status choices.

Figure 5-9: Status Button on the Top Navigation Bar

3. Tap **No Show**. The status is changed in the *"St"* column on the *In-House Waitlist View*. The background color of the party listing also changes to the appropriate color for that status.

Canceling a Waitlist Party

If a guest changes their mind and decides not to wait for a table, you can change the status of the party to *Cancelled*. Cancelled waitlist parties will no longer be visible on the *In-House Waitlist View* but can be seen on the *In-House Waitlist Report* if you select the *Cancelled* status.

To cancel a waitlist party:

1. From the *In-House Waitlist View* or *Active Waitlist*, find and tap the desired waitlist party.
2. Tap the **Status** button on the *Top Navigation Bar* to display the different status choices.

Figure 5-10: Status Button on the Top Navigation Bar

3. Tap **Cancelled**. The waitlist entry is removed from both waitlists.

Time Stamps of Waitlist Party Status Changes

The system captures time stamps for select waitlist party status changes and displays them for the selected party at the bottom of the *In-House Waitlist View*. Status time stamps include the initial arrival time as well as when the party status is changed to *All Arrived, Paged 1, Paged 2, Paged 3,* and *No Show*.

Figure 5-11: Time Stamps on the In-House Waitlist

Seating a Waitlist Party

To seat a waitlist party:

1. From the *In-House Waitlist View* or the *Floor View* / *Active Waitlist Tab,* highlight the party you wish to seat by tapping the party.
2. Tap the **Seat** button in the lower right portion of the view. If you were on the *In-House Waitlist View*, the system navigates to the *Floor View*.

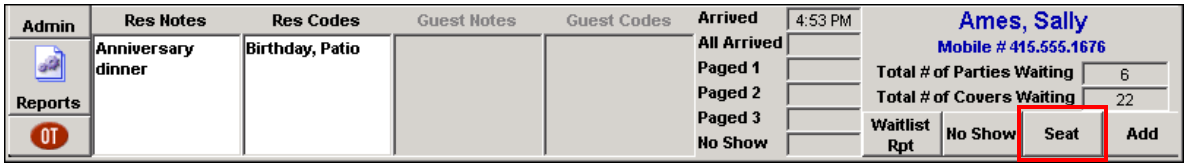


Figure 5-12: Seat Button on the In-House Waitlist

3. Tap the table that you wish to select for this party. The waiting party is seated at the selected table and is removed from the waitlist.

Changing the Sort Order

The default sort order for the *In-House Waitlist View* and *Active Waitlist* is to sort the list by *Arrival Time* and *Party Size* in ascending order.

To change the sort order on the view:

1. Tap once on any of the column headings with the exception of the *Notes* (N) column. The list is sorted in ascending order by that column. The background of the column heading is changed to a light gray color.
2. Tap the same column heading again. The list is sorted in descending order by that column.

*	Arr	Quo	Name	#	N	Tbl	St	Pager	Boo	Qui	Smo	Pat	Notes
	12:15	12:35	Trap, Ellen	2			AA	177				✓	blue dress
	12:13	12:33	Ross, Henry	2			AA	178		✓			Dark suit, red tie
	12:15	12:35	Peters, David	2			AA		✓				Waiting at the bar
	12:14	12:34	Gordon, Pat	2			AA	176	✓				Anniversary lunch

Figure 5-13: Sorting in the In-House Waitlist View

Notes on Using the In-House Waitlist

- The display format on the *Sheet View*, *Book View*, and *Floor View* for parties seated from the wait-list depends on whether or not the guest was selected from the database.
- If the guest was selected from the database, the entry is displayed with the guest's name first and then "Walk-In" in parentheses. For example, "Smith, John (Walk-In)".
- If the guest was NOT selected from the database but entered as a single-use guest name, the entry is displayed as "Walk-In" followed by the guest's name in parentheses. For example, "Walk-In (Smith, John)".
- If you wish to set a party size or wait time that is not represented by one of the buttons on the *Add Waitlist Party Dialog* / *Edit Waitlist Party Dialog*, you can tap the dropdown controls and either select one of the dropdown choices or manually enter a custom value.

- The *Guest Notes and Codes* fields on the *Add Waitlist Party Dialog* / *Edit Waitlist Party Dialog* are only active if the waitlist guest has been selected from the guest database.
- If the quoted time for a waiting party has passed, an "X" appears in the * column to the left of the entry.
- When changing the status of a waitlist party, the only active status buttons are: *Cancelled, No Show, Partially Arrived, All Arrived, Paged 1, Paged 2, Paged 3, Partially Seated,* and *Seated*.
- Changing the waitlist party status to *"Cancelled", "Partially Seated",* or *"Seated"* will make the entry disappear from the waitlist. Although no longer visible on the waitlist, cancelled and seated entries are still reportable on the *In-House Waitlist Report* for up to eight days.

Running the Waitlist Report

Tapping the *Waitlist Report* button on the lower right portion of the *In-House Waitlist View* will immediately generate the *In-House Waitlist Report* for the current shift and will include entries with the following status values: *No Show, Partially Arrived, All Arrived, Paged 1, Paged 2,* and *Paged 3*. For more information, refer to "In-House Waitlist Report" on page 203.

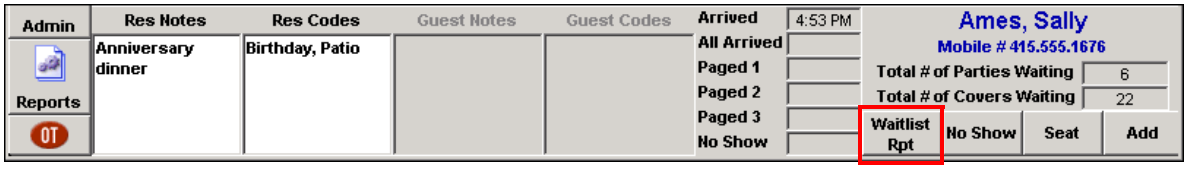


Figure 5-14: Run Waitlist Report on the In-House Waitlist

Chapter 6: Floor View

The *Floor View* is primarily dedicated to seating parties on the floor and keeping track of the status of all tables at any given point in time. Tables are color-coded to reflect their current status (empty, partially arrived, seated, paid, etc.). With the addition of the new *Floor Timers* button, each table displays the time elapsed or time remaining based on your turn time settings. As parties complete their meals and leave, you can clear the table (change status to *Done*) and seat the next party. The new *Options* button gives you options for scheduling and editing the floor layout. You can also assign servers to tables, maintain a waitlist, and make a reservation from the *Floor View*.

Features of the Floor View

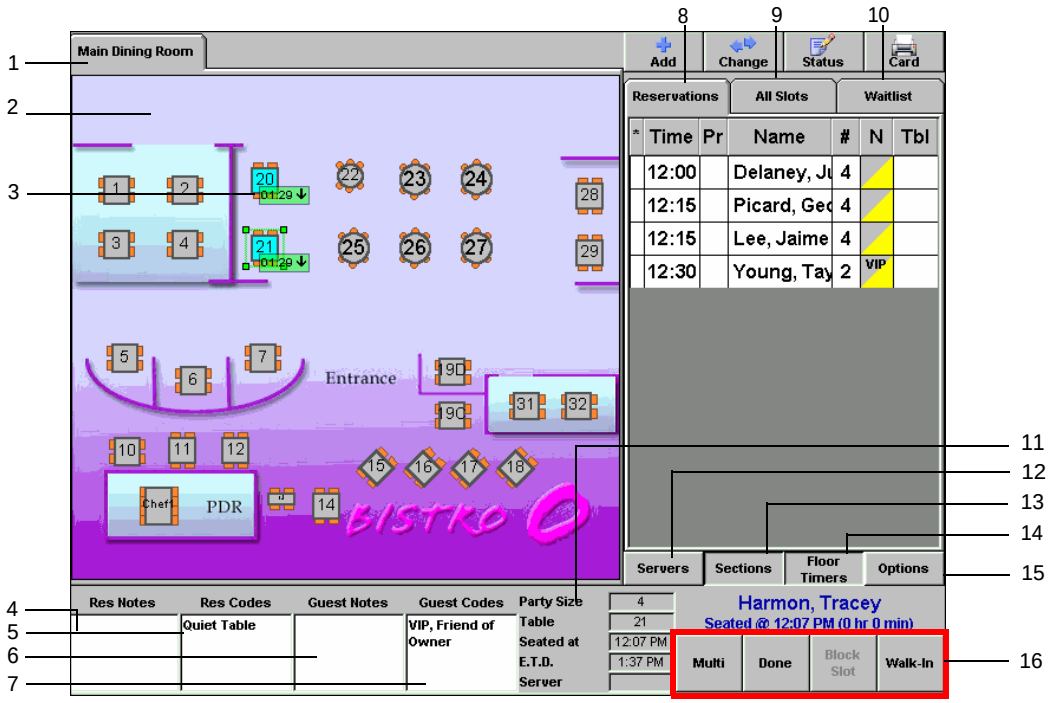


Figure 6-1: Floor View

1	Floor Layout Display Name	Tabbed-interface to navigate between all layouts (4 max)	9	All Slots Tab	Lists all reservations and empty slots for the shift
2	Floor Layout	Layout of tables in the restaurant	10	(Active) Waitlist Tab	Lists names of all parties waiting for a table
3	Table with Chairs and Floor Timer	4-top table. Outline color indicates server	11	Party / Table Info	Lists info for highlighted party/table
4	Res Notes	Show Reservation Notes for selected party. . Tap to edit notes	12	Servers	Tap to assign servers and see cover counts by server
5	Res Codes	Show Reservation Codes for selected party. Tap to assign codes	13	Sections	Show or hide server assignments
6	Guest Notes	Show Guest Notes for selected party. Tap to edit notes	14	Floor Timers	Tap to display Floor Timers - time elapsed or remaining based on turn time settings
7	Guest Codes	Show Guest Codes for selected party. Tap to assign codes	15	Options	Options Include: Changing the schedule, the reservation sheet, and floor layout
8	Reservations Tab	Parties to be seated for the shift	16	Quick Tap Buttons	Highlight a party / slot and tap buttons to perform the operation

Floor View Options

There are two different options that you can configure for the *Floor View* based on the size of your restaurant and your personal preference: table styles and server sections.

If your restaurant has a large number of tables, consider displaying tables without chairs on the floor layout so that it is easier to view and manage.

Table Styles

You can choose to display tables either with or without chairs on the floor layout.

To change your table styles:

1. Tap the **Floor View** button on the *Side Navigation Bar*.
2. Tap the **Options** button in the lower right section of the screen.
3. In the *Options Dialog*, tap the **Edit This Floor Layout** button. If prompted, enter a password that has access to this area to continue.
4. In the *Edit Floor Layout Tab*, tap the **Chair** icon on the right side of the *Top Navigation Bar* (depending on your current table style, tapping the *Chair icon* will either display or hide the chairs).
5. Tap the **Save** icon on the *Top Navigation Bar* to save your changes.

If you choose to display tables with chairs, the # of chairs displayed indicates the table's maximum party size.

Server Sections

You can also choose two different ways to display server assignments - *Webs or Outlines*. If you select the *Webs Option*, the system will draw lines from the table to the server's name, forming a Web-like pattern. If you select the *Outlines Option*, the *Floor View* layout will vary depending on the Table Style. Server assignments for tables with chairs will be indicated by a colored outline around each table. Server assignments for tables without chairs will be indicated by the border color of the table (geometric shape).

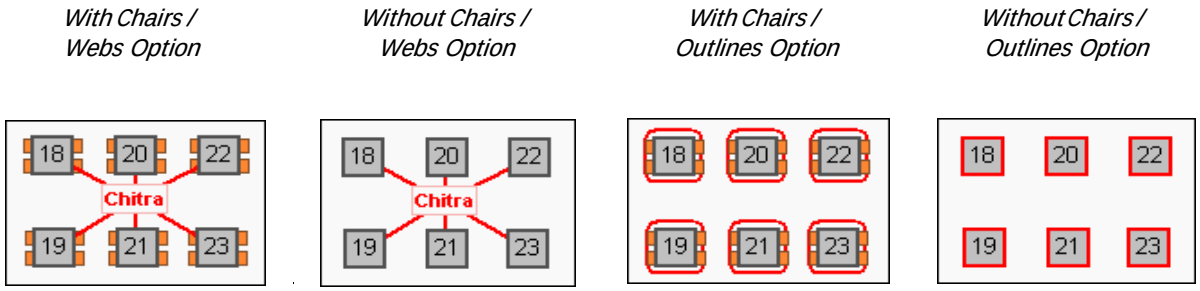


Figure 6-2: Floor View Display Options

Assigning Server Sections

Tapping the **Servers** button in the lower right of the *Floor View* displays the servers that have been assigned to the current shift. To assign tables to servers:

1. Tap the **Admin View / Servers** button to assign servers to a shift (for more information, refer to "Assigning Servers to a Shift" on page 161).
2. Tap the **Floor View** button on the *Side Navigation Bar*. Then tap the **Servers** button.

Figure 6-3: Assigning Servers to Tables on the Floor View

3. Tap the server's name to highlight and select the server (note the server's color).
4. Tap each table that you want to assign to the server. The color of the table outline or border corresponds to the server's color.
   - If you have selected to display tables with chairs, the system will display a colored outline around the table.
   - If you have selected to display the tables without chairs, the system will change the color of the table border.
5. Tap another server's name and then tap the tables you want to assign to that server.
6. Continue this process until you have completed your server assignments.
7. Tap the **Servers** button again to close the server list. The system displays a confirmation dialog.
8. Tap **Yes** to save your server assignments.

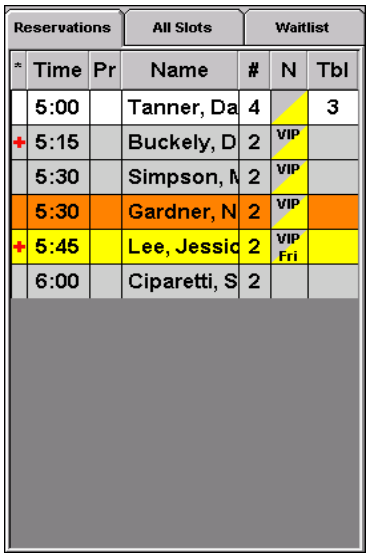
As parties are seated at their tables, the system will keep track of each server's current and total cover counts based on the server table assignments. The *Current Count* next to each server indicates the number of covers that the server is currently servicing (based on the status of the reservation/party). The *Total Count* indicates the total number of covers that the server has serviced for the entire shift.

Assigning sections to servers ensures that server information is saved in a guest's reservation history.

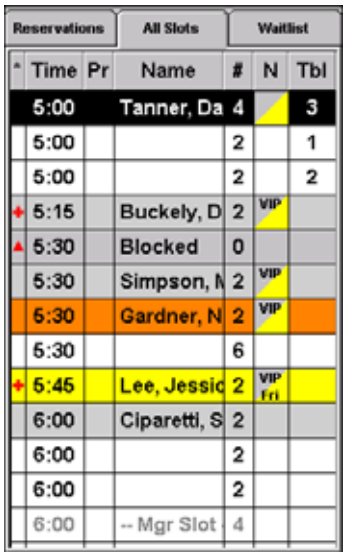
Floor View Tabs

There are three tabs on the right side of the *Floor View*: the *Reservations Tab, All Slots Tab,* and *(Active) Waitlist Tab.* All three tabs are useful in managing the flow of the dining room as guest arrive to dine at the restaurant.

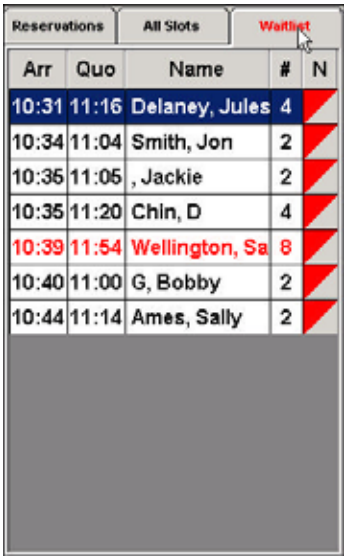
Reservations Tab


Reservations
All Slots
Waitlist
Time Pr Name # N Tbl
5:00 Tanner, Da 4 3
5:15 Buckely, D 2 VIP
5:30 Simpson, N 2 VIP
5:30 Gardner, N 2 VIP
5:45 Lee, Jessic 2 VIP Fri
6:00 Ciparetti, S 2

All Slots Tab



(Active) Waitlist Tab


Reservations
All Slots
Waitlist
Arr Quo Name # N
10:31 11:16 Delaney, Jules 4
10:34 11:04 Smith, Jon 2
10:35 11:05 , Jackie 2
10:35 11:20 Chin, D 4
10:39 11:54 Wellington, Sa 8
10:40 11:00 G, Bobby 2
10:44 11:14 Ames, Sally 2

- *Reservations Tab* - shows all unseated reservations for the selected shift. The system removes reservations from this list as you seat them at a table on the floor.
- *All Slots Tab* - shows the selected shift's entire reservation sheet. This includes all reservations (seated, completed, pending, etc.) as well as blocked and empty slots.
- *(Active) Waitlist Tab* - shows the list of guests that are waiting in-house for a table with their arrival times and quoted times.

Seating Parties on the Floor

As guests begin to arrive during a shift, use the *Floor View* to seat guests at tables on the floor. You can seat guests from the *In-House Waitlist View* or any of the three *Floor View Tabs: Reservations Tab, All Slots Tab,* or *(Active) Waitlist Tab.*

Single Seating from the Floor View

To seat a party on the *Floor View*:

1. Tap one of the three tabs in the upper right portion of the view and tap a reservation to highlight it. Seating is usually performed using the *Reservations Tab.*

2. Tap the **Seat** button in the lower right portion of the view and then tap the desired table to seat the party. You can also seat a party by tapping the party's name and dragging and dropping the party onto the desired table.

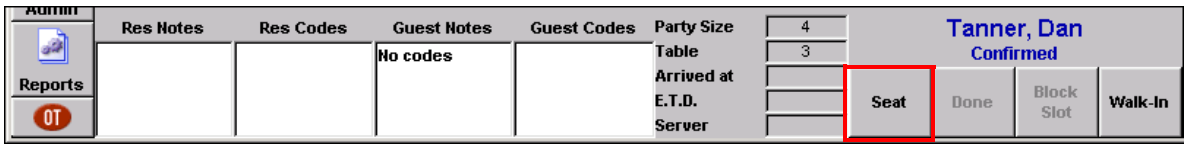


Figure 6-4: Seating a Party Using the Seat Button on the Floor View

Single Seating from the Sheet View or Book View

To seat a party from the *Sheet View* or *Book View:*

1. Tap a reservation to highlight it.
2. Tap the **Status** button on the *Top Navigation Bar* and select the **Seated** status.
3. The system will switch to the *Floor View*. Tap the desired table to seat the party.

For more information, refer to "Seating a Waitlist Party" on page 49.

Partially Seating

To partially seat a party from the *Sheet View*, *Book View*, or *Floor View:*

1. Tap a reservation to highlight it.
2. Tap the **Status** button on the *Top Navigation Bar* and select the **Partially Seated** status.
3. The system will switch to the *Floor View*. Tap the desired table to partially seat the party. The system changes the table color to show that the table is partially seated.
4. When the party has completely arrived, tap the party's table on the *Floor View* and tap the **Seat** button in the lower right portion of the view to complete the seating.

Multi-Seating

To seat a party across multiple tables:

1. Tap a reservation to highlight it.
2. Tap the **Seat** button in the lower right portion of the view.
3. The *Multi* button will now appear in the lower right portion of the view. Tap the **Multi** button.

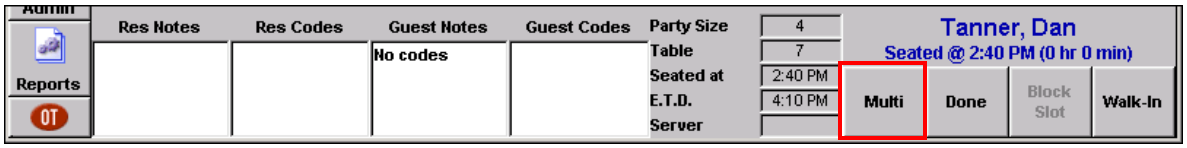


Figure 6-5: Multi-Seating a Party on the Floor View

4. Tap all the tables that you would like to use for the party.
5. Tap **Multi** one more time to complete the seating.

Switching Tables

You can move a party to another table after they have been seated by tapping the party's current table and dragging the party to the new table. If the new table is on a different floor layout, drag the party

across the desired floor layout in the upper left portion of the *Floor View*. When the view refreshes to display the other floor layout, drag the party onto the desired table.

Marking Tables as "Done" Using the Status Button

Once parties are done dining, you can change the status to *Bus Table* while the server staff clears and sets the table for the next party. When the table is ready, mark the table with the *Done* status so that you can seat the next party at the table. To mark a table as *Done*:

1. Tap the **table**.
2. Tap the **Status** button on the *Top Navigation Bar*.
3. Tap the **Done** status. The table is cleared and ready for the next party.

Marking Tables as "Done" Using the Done Button

A faster way to clear the tables is to use the *Done* button at the bottom right of the *Floor View*.

1. Tap the **table**.
2. Tap the **Done** button in the lower right portion of the view. The table is cleared and ready for the next party.

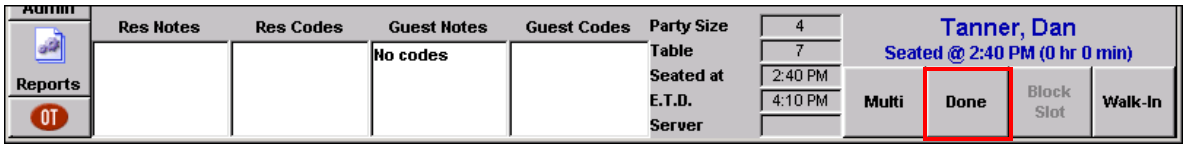


Figure 6-6: Marking a Party as "Done" on the Floor View

Blocking Tables

You can block tables for VIPs and special parties or to indicate a table is closed or removed for that shift.

You can only block tables on the Floor View for today's shifts.

Blocking a Table

To block a table:

1. On the *Floor View*, tap an empty table.
2. Tap the **Block Table** button in the lower right portion of the view. The table is blocked; a red circle with a line across it appears on the table.

Figure 6-7: Blocking Tables on the Floor View

Unblocking a Table

To unblock a table:

1. On the *Floor View*, tap the blocked table.
2. The *Block Table* button changes to the *Unblock Table* button. Tap **Unblock Table**. The table is unblocked and the red circle with a line across it disappears.

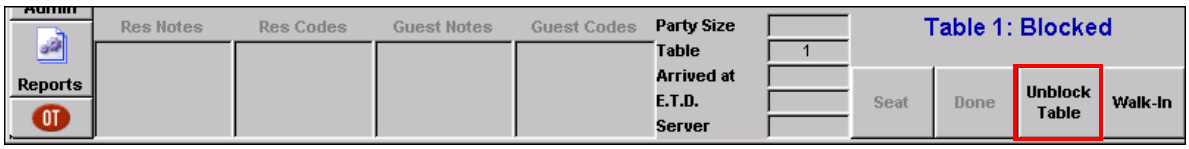


Figure 6-8: Unblocking Tables on the Floor View

Seating at Blocked Tables

You can seat parties at blocked tables in the same way you seat parties at regular tables. The only difference is that the system will prompt you to confirm that you want to seat the party at a blocked table.

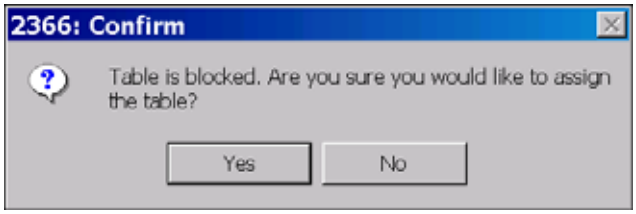


Figure 6-9: Confirm Dialog To Seat a Party at a Blocked Table on the Floor View

Blocking Reservation Time Slots In Floor View

Empty slots can be blocked for VIPs or large parties. Slots can be quickly blocked in the *Floor View* while on the *All Slots Tab.*

Blocking a Slot in the Floor View

1. On the *Floor View*, tap the *All Slots Tab* and tap an empty slot.
2. The button at the bottom right (the same button used to block tables) changes and becomes the *Block Slot* button. Tap the **Block Slot** button. The slot is blocked and the name for the slot will change to "Blocked" with a party size of "0".

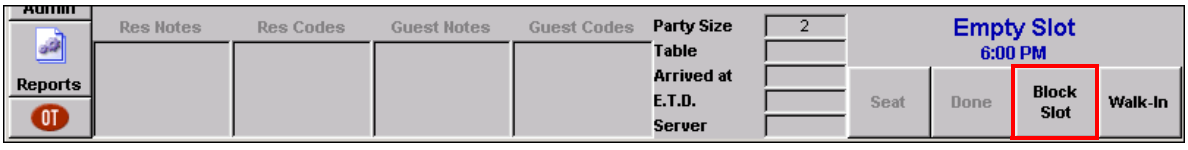


Figure 6-10: Blocking Slots on the Floor View / All Slots Tab

Unblocking a Slot in the Floor View

To unblock a slot in *Floor View:*

1. On the *Floor View*, tap the **All Slots Tab** and tap a blocked slot.

2. The button at the bottom right changes and becomes the *Unblock Slot* button. Tap **Unblock Slot** to remove the block.

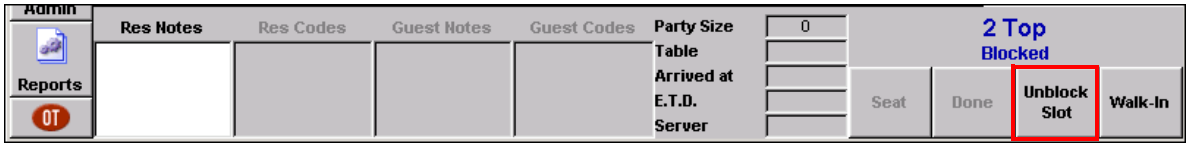


Figure 6-11: Unblocking Slots on the Floor View / All Slots Tab

Walk-Ins

Some restaurants manage a significant number of walk-in guests during a shift. Walk-Ins are diners that do not make a reservation but simply walk in to a restaurant in hopes of getting a table. There are two ways to seat walk-in parties. In the first method, users place a walk-in into an existing slot in the book. In the second method, users place a walk-in into a new (inserted) slot. Placing walk-ins in an existing slot is the preferred method because it maintains the layout of the reservation sheet and lowers the risk of over-booking the restaurant.

Entering Walk-Ins In An Existing Slot

1. From the *Sheet View, Book View, or Floor View / All Slots Tab,* select an empty time slot for today's shift and double tap the slot as you would when making a normal reservation.
2. On the *Guest Identification Dialog*, do not enter a name. Instead, tap the **Walk-In** button.

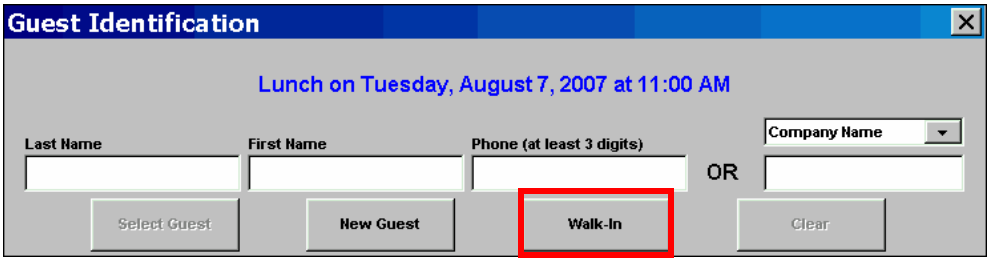


Figure 6-12: Walk-In Button on the Guest Identification Dialog

3. The system will display the *Add Walk-In Party Dialog* and prompt you for the party size, guest name, and reservation notes and codes.

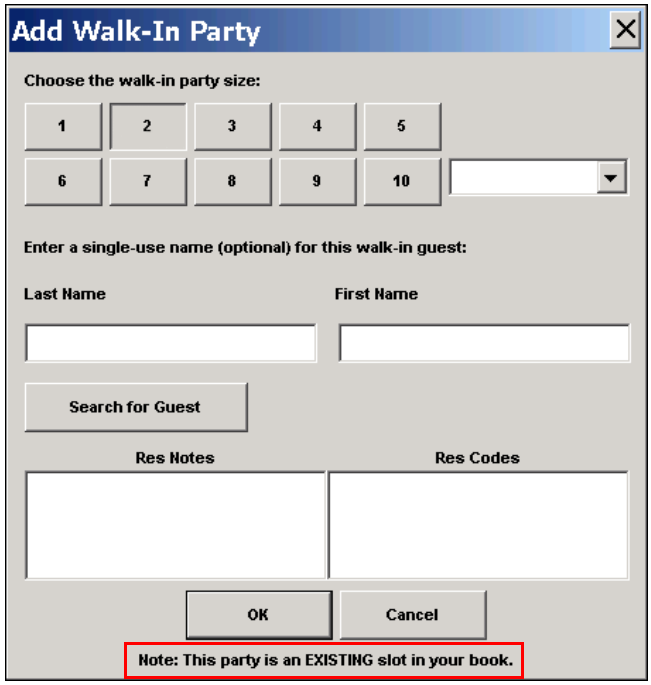


Figure 6-13: Add Walk-In Party Dialog (Existing Slot)

4. To set the party size, tap one of the numbered buttons or tap the dropdown list to select a larger party size.
5. Tap **OK**. If you were on *Sheet View* or *Book View*, the system will automatically navigate to the *Floor View* and turn the mouse pointer into a "hand" icon. Tap a table on the *Floor View* to seat the walk-in.
6. The walk-in party is seated at the selected table and "Walk-In" appears as the name in the slot you selected. If you entered the guest's name, the name is displayed in parentheses after "Walk-In". For example: "Walk-In (Smith, John)".

*	Time	Max	Tbl	Name	#	St	Phone	N	Made
	6:00 PM	2	1	Walk-In (Smith, John)	2	S			03/13

Figure 6-14: Walk-In Entry with a Single-Use Guest Name on the Sheet View

Entering Walk-Ins In An Inserted Slot

Using the *Walk-In* button at the bottom right of the *Floor View* will seat walk-in parties in (new) inserted reservation slots. To enter a walk-in using the *Walk-In* button:

1. On the *Floor View*, tap **Walk-In**.

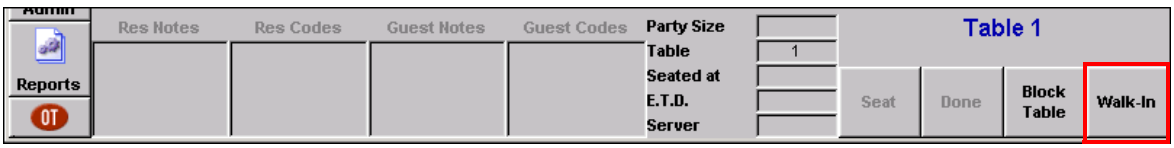


Figure 6-15: Seating a Walk-In on the Floor View

2. Choose the size of the walk-in party in the *Add Walk-In Party Dialog* and tap **OK**.

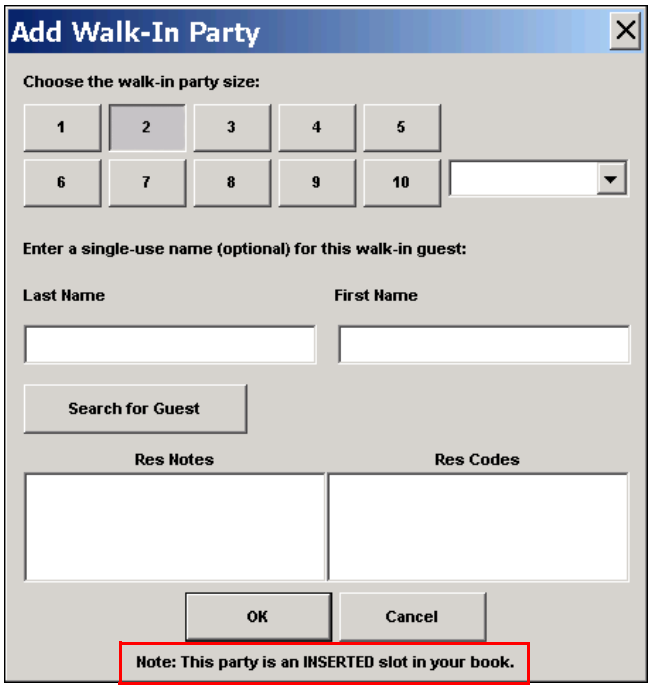


Figure 6-16: Add Walk-In Party Dialog (Inserted Slot)

3. After tapping *OK* you are brought back to the *Floor View*. Tap a table to seat the party. "Walk-In" will appear as the name in a newly created slot in the book. If you entered the guest's name, the name is displayed in parentheses after "Walk-In". For example: "Walk-In (Smith, John)".

Caution: Inserting a slot can overbook your restaurant. The note at the bottom of the Add / Edit Walk-In Party Dialogs indicate whether or not the walk-in has been seated in an inserted or existing slot.

Multi-Seating Walk-ins

Multi-seating is used to seat walk-in parties at more than one table.

To multi-seat a walk-in party at more than one table:

1. Seat the walk-in party at a table as described in previous sections.
2. Tap the party's table and tap the **Multi** button on the bottom right portion of the *Floor View*.

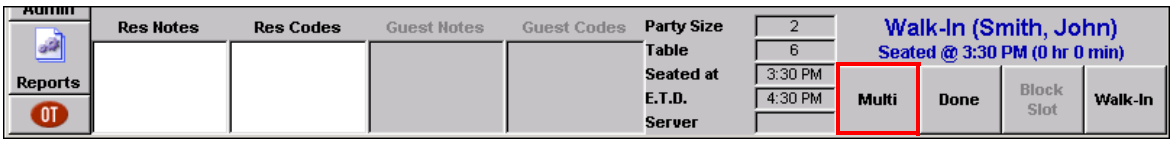


Figure 6-17: Multi-Seating a Walk-In on the Floor View

3. Tap all the tables that the walk-in party will occupy.
4. Tap the **Multi** button again. The tables will change color to the seated status color and will be marked as one party.

Editing Guest Information for Walk-Ins

If the restaurant is busy, it is possible to seat a walk-in party and enter the guest's name and reservation notes and codes later when the hostess has more time. There are two ways to handle guest names for walk-ins: a user can enter a "single-use" guest name or select the guest from the guest database.

Entering a Single-Use Guest Name for a Walk-In

A single-use guest name is only associated with that specific walk-in entry and is NOT saved in the guest database.

To add a single-use guest name to a walk-in party:

1. Locate the walk-in party on the *Sheet View* or *Book View* and double tap the walk-in party.
2. In the *Edit Walk-In Party Dialog*, enter the first and / or last name for the guest and tap **OK**.

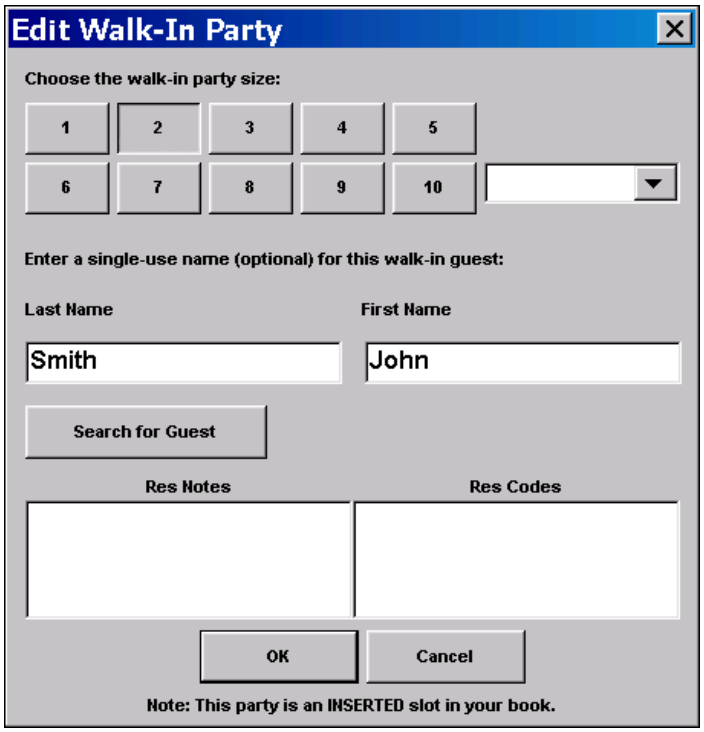


Figure 6-18: Edit Walk-In Party Dialog

3. The guest name is saved and is displayed in parentheses after "Walk-In". For example: "Walk-In (Smith, John)".

Selecting a Guest Name from the Guest Database for a Walk-In

Users can select a guest from the guest database for a walk-in entry. In some cases, the host / hostess recognizes the guest and knows they are a regular and are already in the guest database. To select a guest name from the guest database for the walk-in party:

1. Locate the walk-in party on the *Sheet View* or *Book View* and double tap the walk-in party.

2. In the *Edit Walk-In Party Dialog*, enter the first and / or last name for the guest (1) and tap the **Search for Guest** button underneath the *Last Name* field (2).

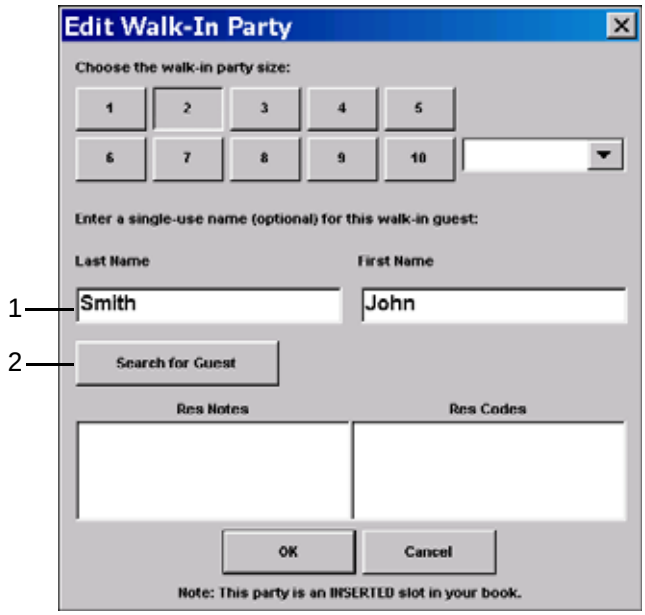


Figure 6-19: Selecting a Guest from the Database in the Edit Walk-In Party Dialog

3. The system displays the *Guest Identification Dialog* and displays a list of guests that match the entered name.

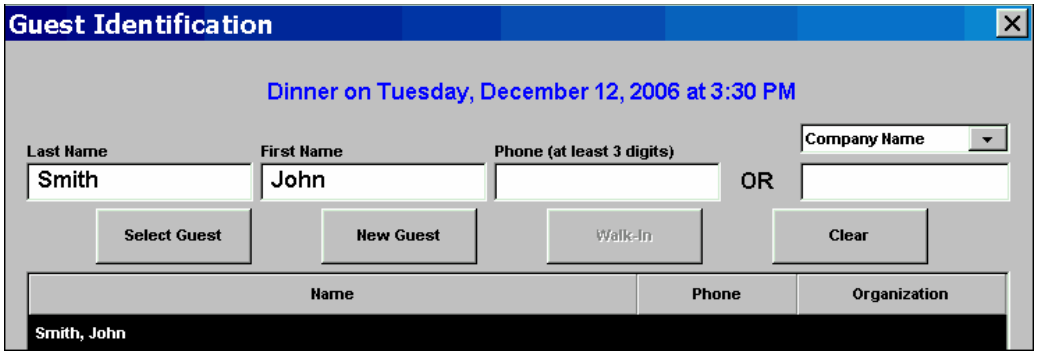


Figure 6-20: Searching for a Walk-In Guest from the Database in the Guest Identification Dialog

4. Tap the correct name and tap the **Select Guest** button. The system returns the user to the *Edit Walk-In Party Dialog*. The guest name is grayed out.
5. Tap **OK**. The guest name is saved and is displayed with "Walk-In" in parentheses after the guest name. For example: "Smith, John (Walk-In)". Note that this is displayed differently from the single-use guest name which would display like this: "Walk-In (Smith, John)". The guest's walk-in count will be updated to reflect this visit in the *Guests View* and the *Make A Reservation Dialog*.

*	Time	Max	Tbl	Name	#	St	Phone	N	Made
	6:00 PM	2	1	Smith, John (Walk-In)	2	S			03/13

Figure 6-21: Walk-In Entry with a Guest from the Guest Database on the Sheet View

Additional Notes About Walk-Ins

- In the *Add Walk-In Party Dialog* and *Edit Walk-In Party Dialog*, you can place the cursor into the dropdown field and manually type in a party size larger than 20.
- If you select a guest from the guest database for a walk-in and save the entry, you will not be allowed to change the guest again for that entry.
- If the walk-in party changes their mind and leaves without dining after they have been seated, change the status of the walk-in entry to either *Cancelled* or *No Show*.

Active Waitlist

The *(Active) Waitlist Tab* on the *Floor View* allows you to manage a guest waitlist for one of today's shifts. To see the *Active Waitlist*, tap the **Floor View** button on the *Side Navigation Bar* and tap the **Waitlist Tab** on the far left. For more information, refer to "Using the In-House Waitlist View" on page 43.

- For instructions on how to add a party to the *Active Waitlist,* refer to "Adding a New Waitlist Party" on page 45.
- For instructions on how to edit a party on the *Active Waitlist*, refer to "Editing an Existing Waitlist Party" on page 46.
- For instructions on how to change a waiting party's status on the *Active Waitlist*, refer to "Changing the Status of a Waitlist Party" on page 47.
- For instructions on how to seat a party from the *Active Waitlist* onto the floor, refer to "Seating a Waitlist Party" on page 49.

Using the Active Waitlist

- When there are 1+ parties on the waitlist, the "Waitlist" label on the *Waitlist Tab* turns red.
- When the quoted time has passed for a waiting party, the "Waitlist" label on the *Waitlist Tab* blinks.
- Tap a column header (except the *Notes* column) to sort the list in ascending order by that column.
- Tap the column header again to sort the list in descending order.
- When changing the status of a waitlist party, the only active status buttons are: *Cancelled, No Show, Partially Arrived, All Arrived, Paged 1, Paged 2, Paged 3, Partially Seated, and Seated*.

Chapter 7: Future Waitlist

The *Future Waitlist View* allows you to maintain a list of guests that are interested in dining during a specific future day or shift when the restaurant is fully booked (for example, during special event days like Valentine's Day and restaurant events). The *Future Waitlist View* is different than the *In-House Waitlist View* or *Active Waitlist*. The *In-House Waitlist View* and *Active Waitlist* are intended to keep track of quoted times and guests that are on the premises and are waiting for a table during the current shift. The *Future Waitlist View* is intended to track guest requests for reservations on future dates.

Adding a Future Waitlist Entry

To add a future waitlist entry:

1. In *Sheet View* or *Book View*, tap the **Shift** button (1) on the *Top Navigation Bar* to select the desired shift.
2. Tap the **Calendar** button (2) on the *Top Navigation Bar* to navigate to the desired date.

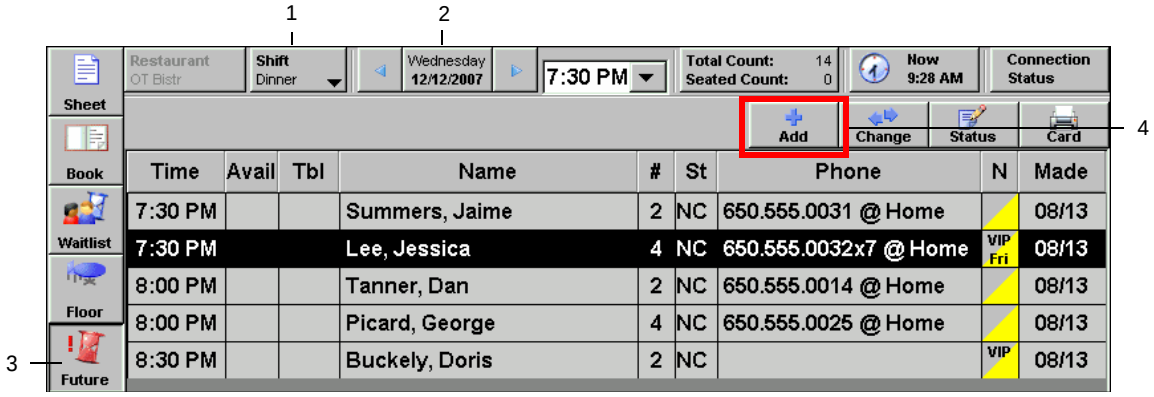


Figure 7-1: Future Waitlist View

3. Tap the **Future** button (3) on the *Side Navigation Bar*. Then tap **Add** (4) on the *Top Navigation Bar*. The system will display the *Add Future Waitlist Party Dialog*.

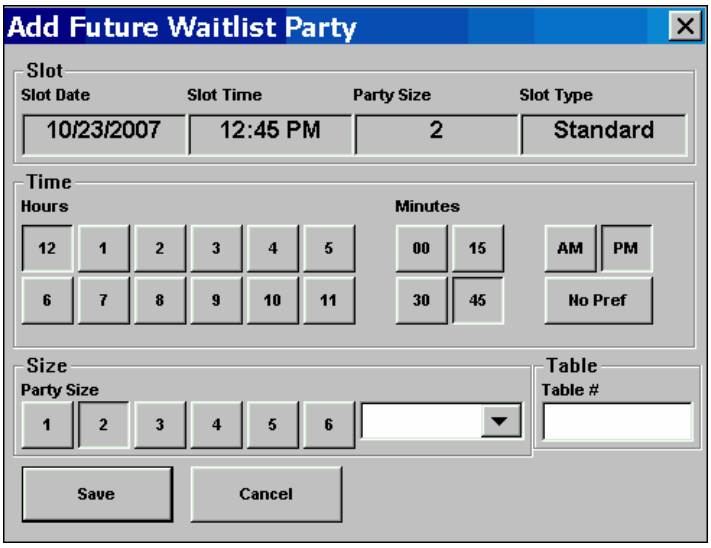


Figure 7-2: Add Future Waitlist Party Dialog

4. Select time preference (if any) and party size for the entry and tap **Save**. The *Guest Identification Dialog* is displayed.
5. Enter the guest's name and either select an existing guest or add a new guest. The system displays a dialog that looks exactly like the *Make A Reservation Dialog*.
6. Add any additional guest and reservation details and tap **Save**. The future waitlist entry is saved. The *Future* button on the *Side Navigation Bar* turns red and contains an exclamation point to signify that there is an entry on the *Future Waitlist View* for that shift.

Changing the Sort Order on the Future Waitlist

The default sort order for the *Future Waitlist View* is to sort the list by *Arrival Time* and *Party Size* in ascending order. You can change the sort order by tapping any of the column headings except for the *Notes* (N) column.

1. Navigate to the *Future Waitlist View*.
2. Tap the column heading of the column you want to sort by (the *Name* column for example). The view re-sorts in ascending order by that column. The background of the column heading changes to a lighter shade of gray to indicate that the view is sorted by that column.
3. Tap the same column heading again. The view re-sorts in descending order by that column.
4. Tap the **Time** column to reset the sort order of the view to the default sort order.

Using the Future Waitlist

When using future waitlist, you can:

- Edit details of the entry by double tapping a future waitlist entry to edit the details for the entry.
- View the future waitlist entry to see if a reservation slot is available that can accommodate the guest's request (a checkmark will be displayed next to the entry in the *Avail* column).
- Tap the **History** button when editing the guest's information in the *Guests View* to see their future waitlist entries (future waitlist entries are tracked in a guest's history in the *Upcoming Waitlist Section)*.

Transferring Future Waitlist Entries to Your Reservation Book

To move a future waitlist entry into a reservation slot, use the standard *Move* function:

1. Highlight the future waitlist entry you want to move to a reservation slot by tapping the entry.
2. Tap the **Change** button on the *Top Navigation Bar* to display the *Change Entry Dialog* choices.

Figure 7-3: Top Navigation Bar

3. Tap **Move Entry**.

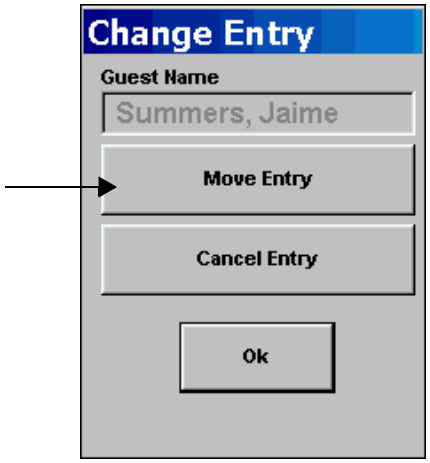


Figure 7-4: Move Entry Button on the Change Entry Dialog

4. The system will display the name and party size (2) and the original date and time of the entry (4) you are moving at the bottom of the view.

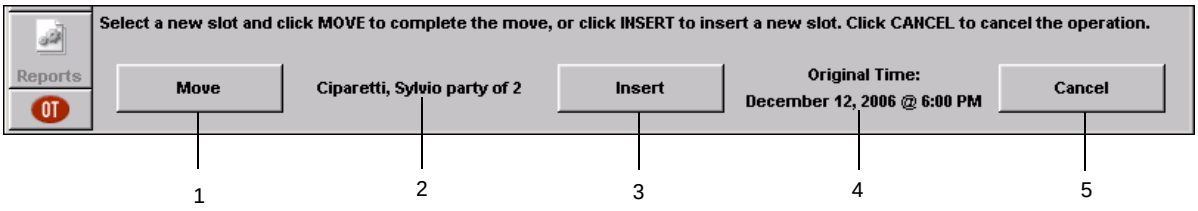


Figure 7-5: Controls for Moving a Future Waitlist Entry

1	Move	Completes the move	4	Original date and time	Original date and time
2	Party Info	Guest Name and party size	5	Cancel	Cancels the move
3	Insert	Inserts a new slot			

5. You now have three options:
   - To move the future waitlist entry to an existing empty reservation slot, tap the **Sheet View** or **Book View** button on the *Side Navigation Bar*, navigate to the desired date and shift, tap the **slot**, and tap **Move** (1) at the bottom of the view to complete the move. You can tap the **Calendar** button on the *Top Navigation Bar* to move to a different day.
   - To move the future waitlist entry to a newly inserted reservation slot, tap the **Sheet View** or **Book View** button on the *Side Navigation Bar*, navigate to the desired date and shift, tap **Insert** (3) at the bottom of the view to create the new slot and then tap **Save** to complete the move.
   - To cancel the move, tap **Cancel** (5).

Caution: Inserting a slot can overbook your restaurant.

Chapter 8: Guests View

The *Guests View* is used to capture and manage guest information such as phone numbers, addresses, E-Mail Addresses, Company Name and special requests and preferences. Knowing more about your guests will enable you to provide better service and increase return visits to your restaurant.

Guests View

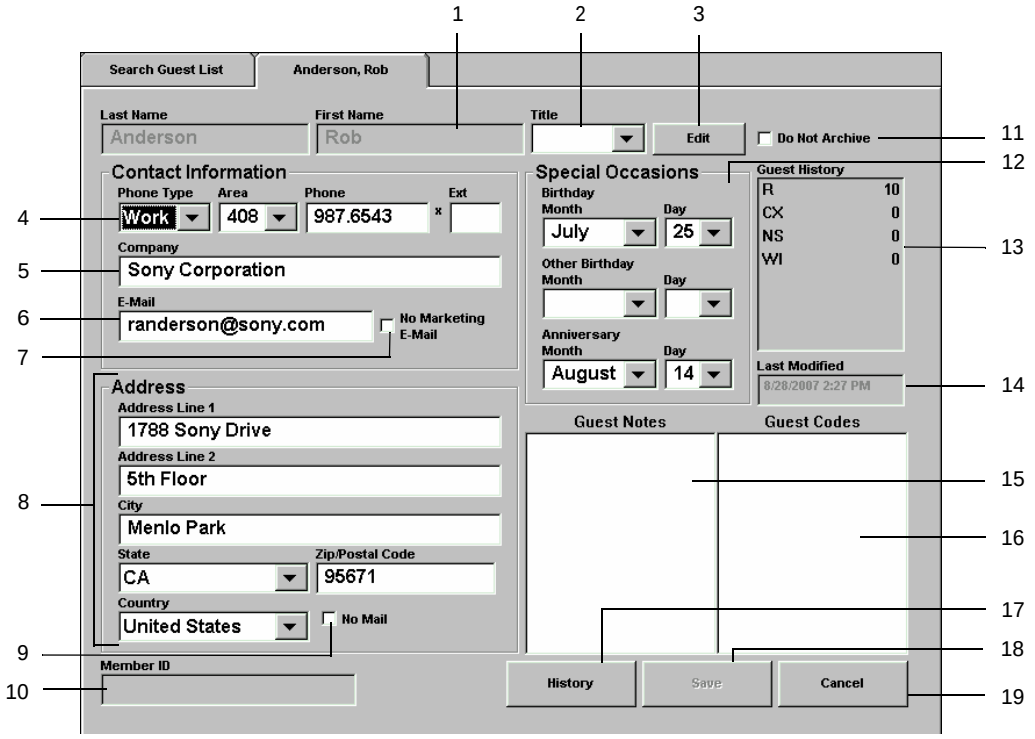


Figure 8-1: Guests View

1	Name	Guest's name	11	Do Not Archive	Guest data is never archived
2	Title	Guest's title	12	Special Occasions	Captures guest birthday, other birthday and anniversary dates
3	Edit	Enables user to edit the guest's name	13	Guest History Summary	# of reservations, cancellations, no shows, walk-ins, guest spending history
4	Phone	Guest's phone number (multiple types)	14	Date Last Modified	Date when guest information was last updated
5	Company	Guest's company	15	Guest Notes	Guest preferences & comments for this guest
6	E-Mail	Guest's E-Mail Address	16	Guest Codes	Guest Codes for this guest
7	No Marketing E-Mail	Marketing E-Mail opt-out (if checked)	17	History	See detailed listing of reservations, cancellations, & future waitlist entries
8	Address	Guest's address	18	Save	Saves changes to the guest information
9	No Mail	Mail opt-out (if checked)	19	Cancel	Discards any changes to the reservation (after confirmation)
10	Member ID	Member ID number (if applicable)			

Finding a Guest and Adding a New Guest

The *Guests View* allows you to add, merge or delete a guest and search your entire guest database by name, phone number, E-Mail Address, Company Name or Member ID.

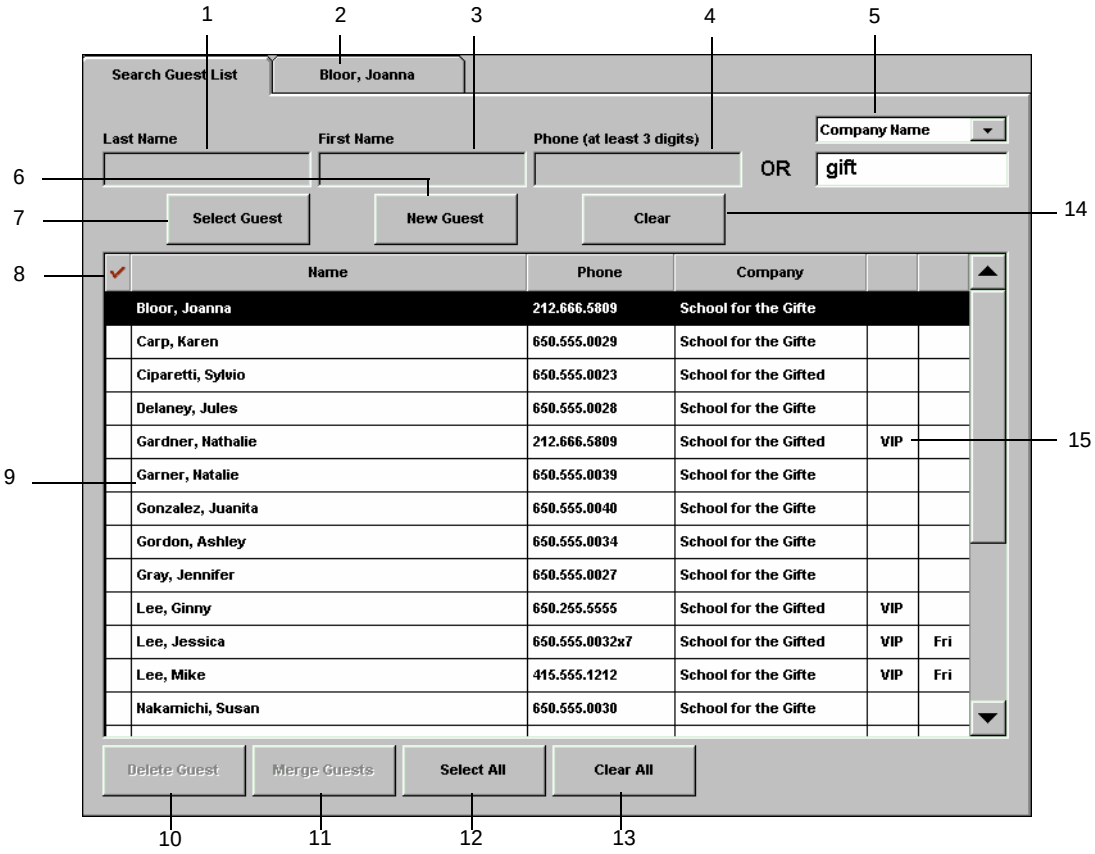


Figure 8-2: Search for Guests by Name

1	Last Name	Search by guest's last name	9	Search Results Area	Displays guests that match the entered search criteria
2	Guest Detail Tab	Tap tab to display the guest information	10	Delete Guest	Delete the selected guests (guests with checkmarks)
3	First Name	Search by guest's first name	11	Merge Guests	Merge the selected guests (guests with checkmarks)
4	Phone	Search by guest's phone number (must enter a minimum of 3 digits to begin the search)	12	Select All	Selects all guests listed in the Search Guest List View
5	Alternate Search criteria	Search by E-Mail Address, Company Name or Member ID number	13	Clear All	Unselects all guests listed in the Search Guest List view
6	New Guest	Creates a new guest entry	14	Clear	Clears all search fields
7	Select Guest	Selects the highlighted guest and displays the guest information	15	Guest Recognition Codes	Guest Recognition Codes will display if configured and assigned to the guest
8	Select Column	Tap column next to guest name to select the guest (checkmark appears)			

Searching for Guests

To begin searching for guests:

1. Tap **Guests View** on the *Side Navigation Bar.*
2. Decide how you want to search for the guest. You can search by guest name and/or phone number or use the dropdown menu and select E-Mail Address, Company Name or Member ID.
   - To search by guest name and/or phone number, enter a combination of last name, first name, and/or phone number (enter a minimum 3 digits), or
   - Search by E-Mail Address only (enter a minimum 2 characters - searches for any occurrence of the entered string. For example, type in Yahoo to find all Yahoo E-Mail Addresses), or
   - Search by Company Name only (enter a minimum 2 characters - searches for any occurrence of the entered string. For example, type in Apple to find all guest working at Apple), or
   - Search by Member ID only (enter a minimum of 4 characters).

   Note that when you use the dropdown menu to search by E-Mail Address, Company Name or Member ID, the last name, first name and phone number fields are disabled.

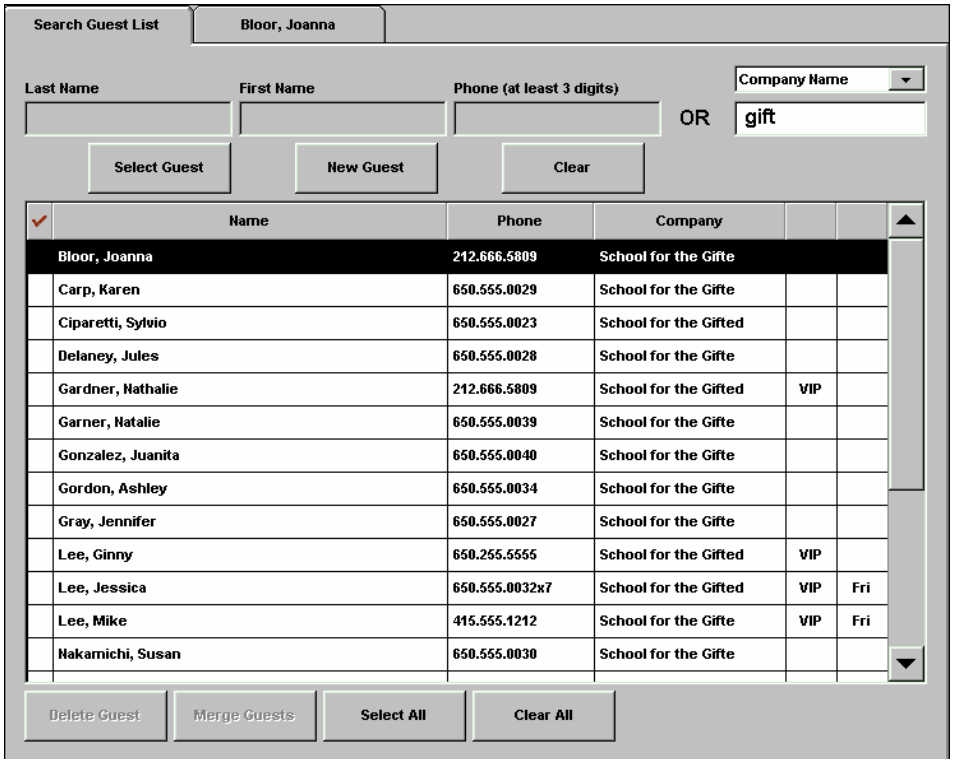

Search Guest List
Bloor, Joanna
Last Name
First Name
Phone (at least 3 digits)
Company Name
OR
gift
Select Guest
New Guest
Clear
Name
Phone
Company
Bloor, Joanna 212.666.5809 School for the Gifte
Carp, Karen 650.555.0029 School for the Gifte
Ciparetti, Sylvio 650.555.0023 School for the Gifted
Delaney, Jules 650.555.0028 School for the Gifte
Gardner, Nathalie 212.666.5809 School for the Gifted VIP
Garner, Natalie 650.555.0039 School for the Gifte
Gonzalez, Juanita 650.555.0040 School for the Gifte
Gordon, Ashley 650.555.0034 School for the Gifte
Gray, Jennifer 650.555.0027 School for the Gifte
Lee, Ginny 650.255.5555 School for the Gifted VIP
Lee, Jessica 650.555.0032x7 School for the Gifted VIP Fri
Lee, Mike 415.555.1212 School for the Gifte VIP Fri
Nakamichi, Susan 650.555.0030 School for the Gifte
Delete Guest
Merge Guests
Select All
Clear All

Figure 8-3: Search for Guests By Company Name

3. If the desired guest's name appears in the list, tap it once to highlight the guest.
4. The highlighted guest's name will appear on a second tab at the top of the view. Tap the **Select Guest** button or tap the second tab to see the guest's information.
5. If no matches are returned or you wish to add a new guest with the same name, tap the **New Guest** button.

You can search by a combination of guest last name, first name, and phone number. You cannot combine that with E-Mail Address, Company Name and Member ID.

Deleting A Guest

You may wish to delete guest records to remove old guests or guests created by mistake. Guests can be deleted within the *OpenTable* system from the *Search Guest List Dialog*.

To delete a guest:

1. Tap **Guests View** on the *Side Navigation Bar*.
2. Type in the guest information (either enter last name, first name, and/or phone number or use the dropdown menu and enter the E-Mail Address only, Company Name only or Member ID only).
3. The system will display all matching guest entries. Select the guest(s) that you want to delete by tapping the **Select** (checkmark) column to the left of the desired guest(s). A checkmark appears next to your selected entries. You can un-select a guest by tapping the **Select** column again. You can also tap the *Select All* and *Delete Guests* buttons to delete all guests displayed in the list. Tap the *Clear All* button to unselect all guests.
4. Tap the **Delete Guest** button at the bottom of the dialog. You must have selected at least one guest to enable the *Delete Guest* button.
5. If prompted, enter a password that has access to this area to continue.
6. The system displays a confirmation dialog. Tap **Yes** to confirm the deletion. The system will delete all selected guest(s) displayed. The deleted entries are no longer displayed.

Depending on the situation, you may wish to merge guests instead of deleting them. Merging guests preserves the guest history of all the guest records that are merged together. See the next section for details on merging guests.

Notes on using the delete guest features:

- Guests that have a pending reservation or are on any waitlist cannot be deleted.
- You can password protect the *Delete Guest* feature in the *Admin View / Access Rights* area.

Merging Guests

When entering guests into the system, sometimes guests are mistakenly added twice. You can merge guest records in the *Search Guest List Dialog*. All reservation history will be reassigned to the merged guest record.

To merge guests:

1. Tap **Guests View** on the *Side Navigation Bar*.
2. Type in the guest information (either enter last name, first name, and/or phone number or use the drop down menu and enter the E-Mail Address only, Company Name only or Member ID only).
3. The system will display all matching guest entries. Select up to three guest(s) that you want to merge by tapping on the **Select** (checkmark) column to the left of the desired guest(s). A checkmark appears next to your selected entries. You can un-select a guest by tapping the **Select** column again.

You must select at least two and no more than three guests to enable the Merge Guests button. To merge more than three guests, perform the merge multiple times.

4. Tap the **Merge Guest** button at the bottom of the dialog.
5. If prompted, enter a password that has access to this area to continue. The system displays the names, phone numbers, company name of your selected entries in the *Merge Guest Dialog*.

6. The system selects the first entry as the *Master* entry by default. Select the **Master** entry by tapping the **Select** (checkmark) column to the left of the desired guest and tap **OK.**

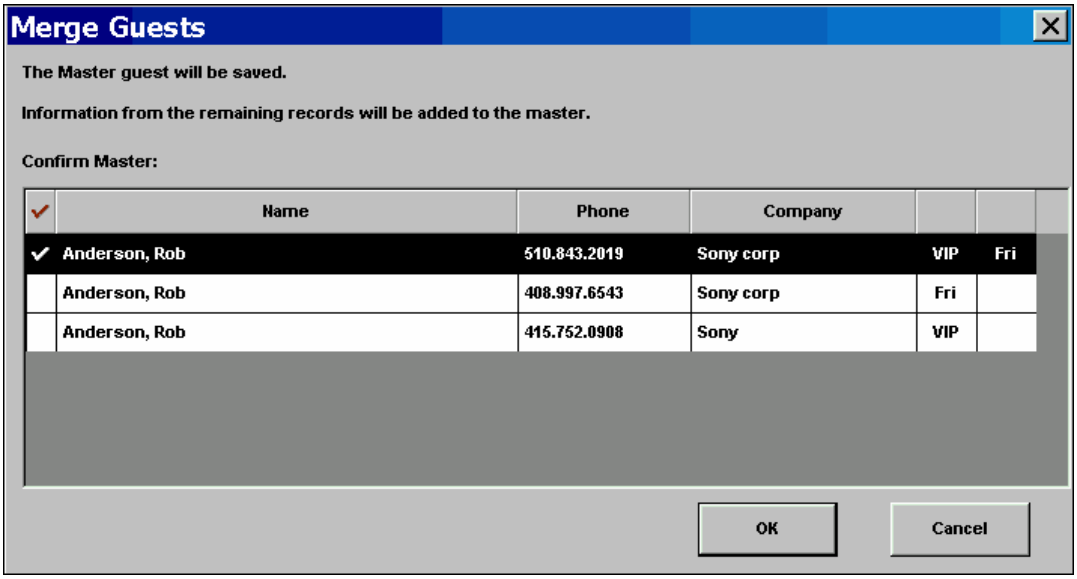


Figure 8-4: Selecting the Master Guest When Merging Guests

7. The confirm dialog is displayed. Tap **Yes** to merge the guests.

Figure 8-5: Confirmation Dialog When Merging Guests

8. The system merges all guest information into the master entry and displays an *Information Dialog* to let you know that the merge is complete. All information from the Master entry has been retained (for

special exceptions, refer to "Important Notes About Merging Guest Records" on page 73). Only the *Master* entry is displayed in the list.

Figure 8-6: Merge Completion Dialog

9. Select the guest name to view the updated information.

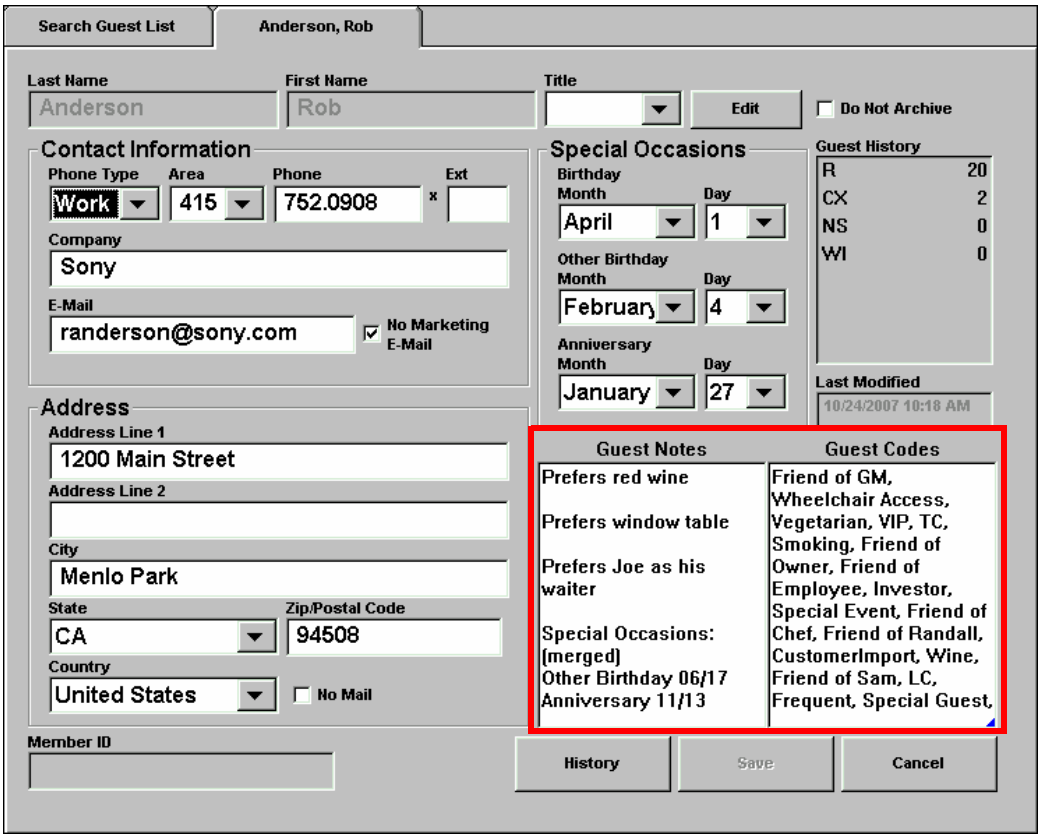


Figure 8-7: View Guest Record

When there is conflicting guest information in the *Special Occasions* section (for example, two anniversaries), the system adds the information to the *Master* record in the *Guest Notes* section.

If any of the Non-Master guest entries have pending reservations or are on any waitlist, the system will display an error message and not merge the guests. This safeguard is designed to prevent any confusion over "lost" reservations and waitlist entries.

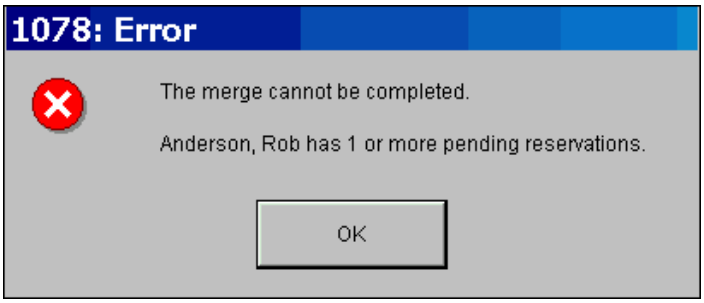


Figure 8-8: Warning Message for Failed Guest Merges

How the System Handles Data Conflicts for a Merge

- The following special case applies only when merging **three** guests. This case does NOT apply to the *Guest Notes* field. If the master entry does not have information for the address, E-Mail Address, Company Name, or phone number (i.e. home phone) but the two non-master entries have information for that field, the system will display a dialog and ask you to select which information to retain in the merged entry. Select the information you wish to keep and tap **Continue**.

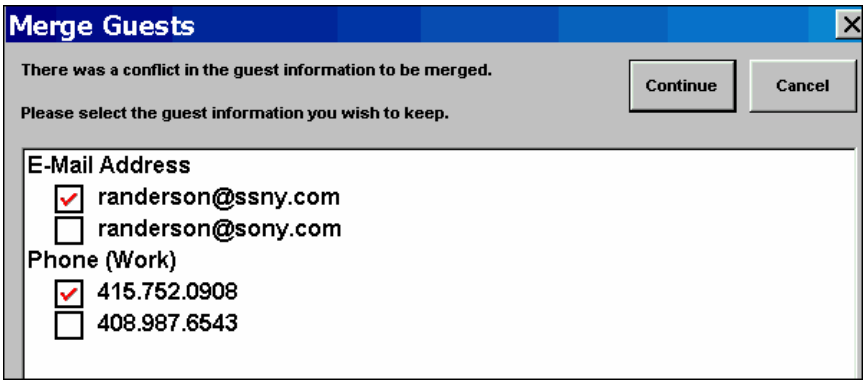


Figure 8-9: Guest Information Conflict Dialog When Merging Guests

- If the resulting merged guest has more than three unique special occasions, the additional special occasions are added to the *Guest Notes*.
- All *Guest Notes* are appended to the master entry up to a maximum of 1,500 characters.

Important Notes About Merging Guest Records

- The reservation history for all merged guests will be associated with the master entry.
- All *Guest Codes* for all merged guests will be retained in the master entry. If the merged guest will have > 20 unique codes and you edit the guest information, the system will prompt you to unselect some of the codes.
- You can password protect the *Merge Guest* feature in the *Admin View / User Rights* area. For more information, refer to "Access Rights" on page 179.

Guest Addresses

Based on the country configuration for your *OpenTable* system, the following fields are required when entering guest addresses into the *OpenTable* system:

Country	Address 1	Address 2	City	*State / County / Ect.	Zip / Postal Code	Country
Canada	Required		Required	Required	Required	Required
France	Required		Required	Required	Required	Required
Germany	Required		Required	Required	Required	Required
Hong Kong	Required			Required		Required
Japan	Required		Required	Required	Required	Required
Mexico	Required		Required	Required	Required	Required
Singapore	Required		Required		Required	Required
Spain	Required		Required	Required	Required	Required
United Kingdom	Required		Required		Required	Required
United States	Required		Required	Required	Required	Required
All Others	Required		Required		Required	Required

Table 8-1: International Address Field Requirements

* The “State / County / Etc.” label varies by country and can also include Region, Province, and Prefecture.

Chapter 9: Reserve View

The *Reserve View* is an efficient way to make reservations for any day and time without browsing through the *Sheet View* or *Book View*. In order to make a reservation using the *Reserve View*, tap the appropriate buttons to select the reservation date, time, shift, and party size. The system will display the available slots based on your selections.

Features of the Reserve View

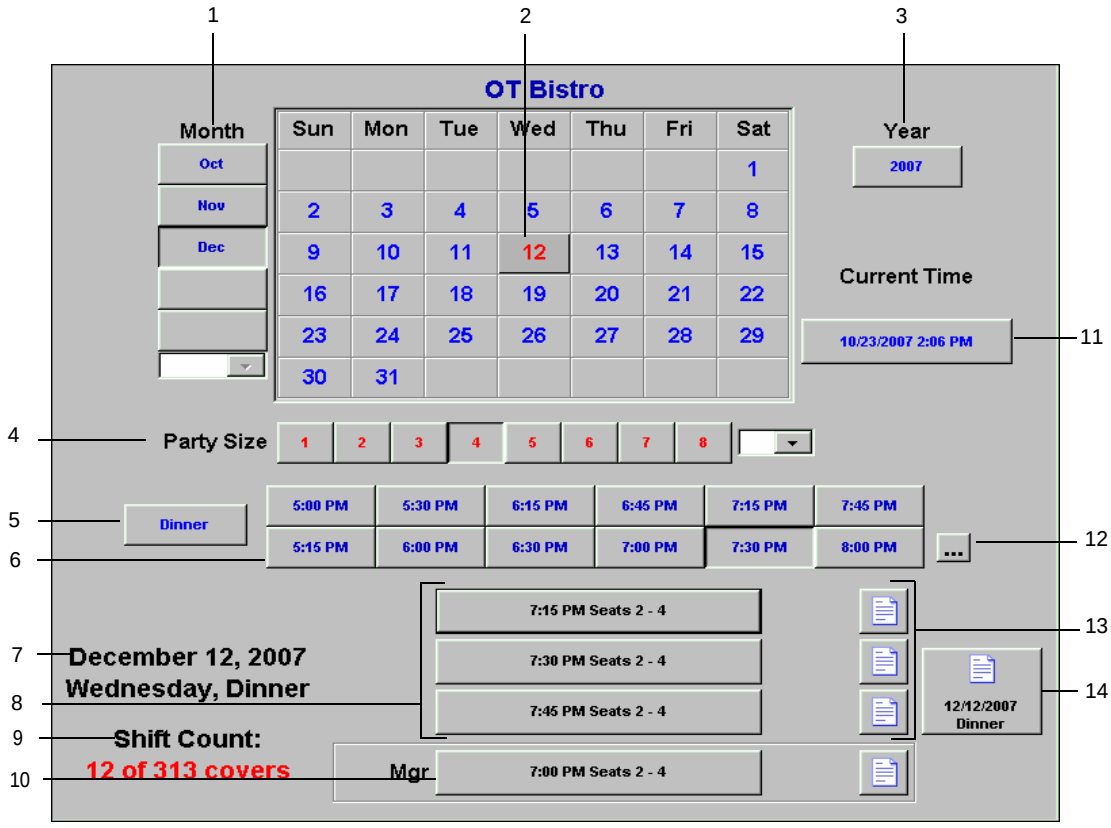


Figure 9-1: Reserve View

1	Month	Change the calendar display to another month	8	Available Standard Slots	Select one of these slots for booking and start the reservation process
2	Selected Date	The selected date for your search	9	Shift Count	Displays number of covers for the selected date and shift
3	Year	Change the calendar display to another year	10	Available Manager Slot	Select this manager slot for booking and start the reservation process
4	Party Size	Desired party size for the slot you are searching for	11	Current Time	Change the calendar to the current date and time
5	Shift	Change the shift	12	More Time Slots	Display more time options
6	Select Time Slot	Desired time for the slot you are searching for	13	Go to This Slot	Go to this slot on the Sheet View
7	Selected Date and Shift	Currently selected date and shift	14	Go to This Shift	Go to the first slot on this shift on the Sheet view

Making a Reservation Using Reserve View

To make a reservation using *Reserve View:*

1. Tap **Reserve View** on the *Side Navigation Bar*.
2. Tap the appropriate buttons to select the desired date, party size, shift, and time for the reservation you want to book. Based on your selected search criteria, the system displays up to three standard reservation slots and one manager reservation slot as buttons at the bottom of the *Reserve View.*
   a. Button displays the nearest available *Standard Slot* before your selected time.
   b. Button displays a slot that exactly matches your selected time. If there is no match, the button is blank and disabled.
   c. Button displays the nearest available *Standard Slot* after your selected time.
   d. Button displays the nearest available *Manager Slot*.

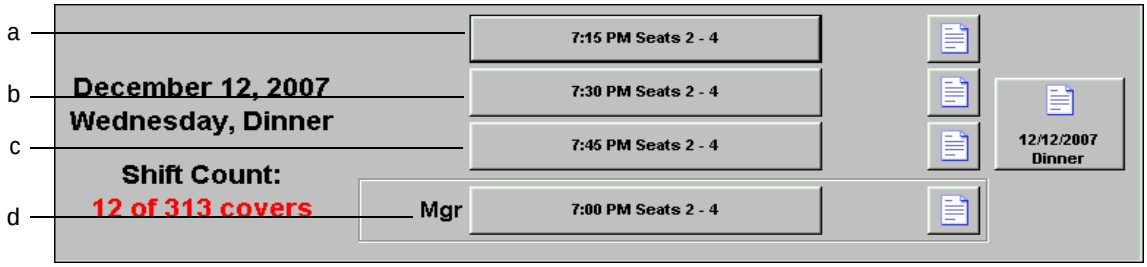


Figure 9-2: Available Standard and Manager Slots in Reserve View

3. Tap the button for the available reservation slot you want to select. The system displays the *Guest Identification Dialog*.

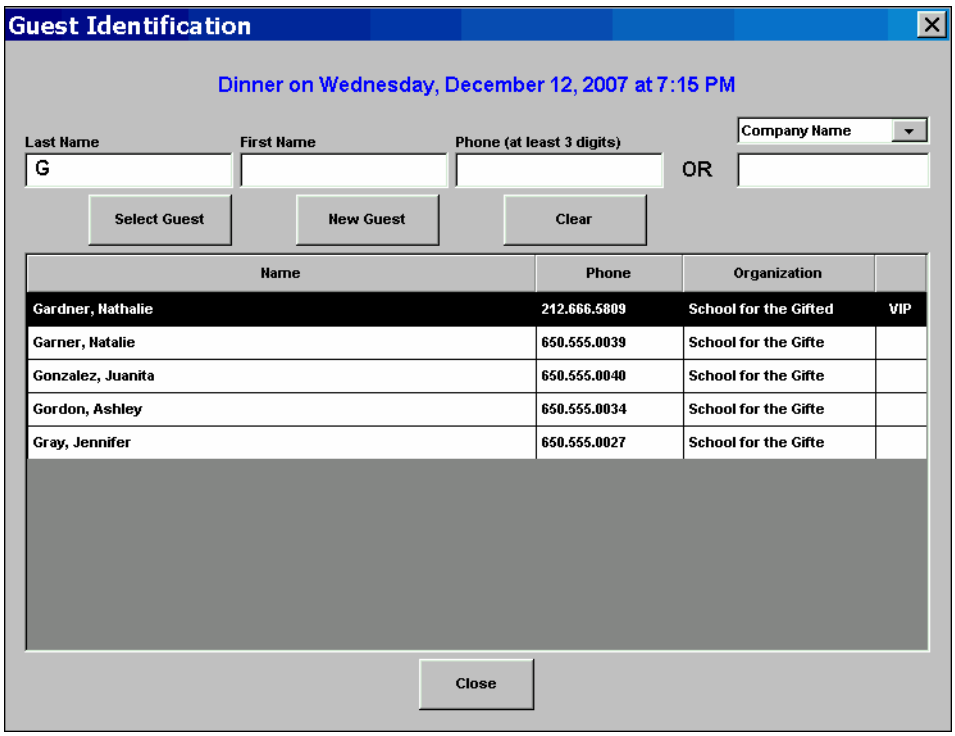


Figure 9-3: Guest Identification Dialog

4. Enter the guest's last name, first name and/or the guest's phone number in the *Guest Identification Dialog.* If the correct guest appears in the list (check the phone number), double-tap the name or tap the guest name once to highlight it and tap the **Select Guest** button. If there are no matches for your guest, tap the **New Guest** button to create a new guest record. The *Make A Reservation Dialog* will appear.
5. Input all reservation details on the *Make A Reservation Dialog*. When finished, tap the **Save** button.
6. Depending on how your reservation book is configured, the system may prompt you to enter some required fields (like phone number and user) or to enter a password when saving the reservation. If all required fields and passwords are entered correctly, then the system saves the reservation and refreshes the screen. The reservation is booked and you will be returned to the *Reserve View*.

Chapter 10: Restaurant Notes

The *Notes View* allows you to store general restaurant information that is often requested by guests and callers.

Features of the Notes View

There are five tabs that you can use to organize the restaurant's information:

- Shift Notes
- Bulletin Board
- Directions
- Restaurant Info
- Phone Numbers

To add, change, and delete notes, tap the desired tab, make your edits, and tap **Save**.

Shift Notes are shift-specific and can be configured to pop-up every time a user navigates to a specific shift on a specific date by checking the *Pop Up These Notes* setting. The icon on the *Notes View* button on the *Side Navigation Bar* will turn red if there are notes for the current shift.

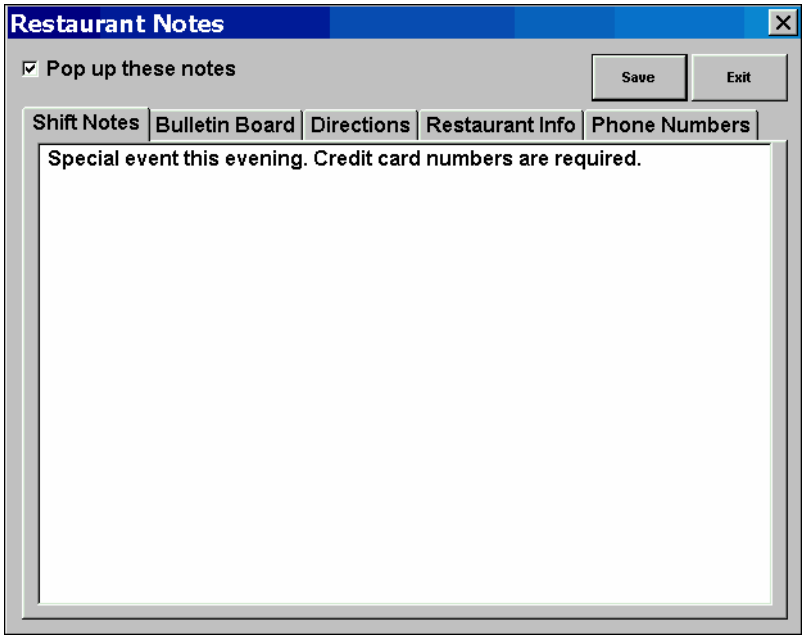


Figure 10-1: Restaurant Notes

Chapter 11: Admin View - Overview

The *Admin View* groups related configuration settings together with the more frequently used ones on the top half of the view (*Main Options* and *Lists*). Tap any one of the buttons to edit the settings. Note that access to some settings may be password protected. After you make and save your changes, all changes will take effect immediately on all computers running the *OpenTable* software.

This chapter will give you a high level overview of the different groups of configuration settings in the *Admin View*. Subsequent chapters will explore each group of settings in more detail.

Admin View

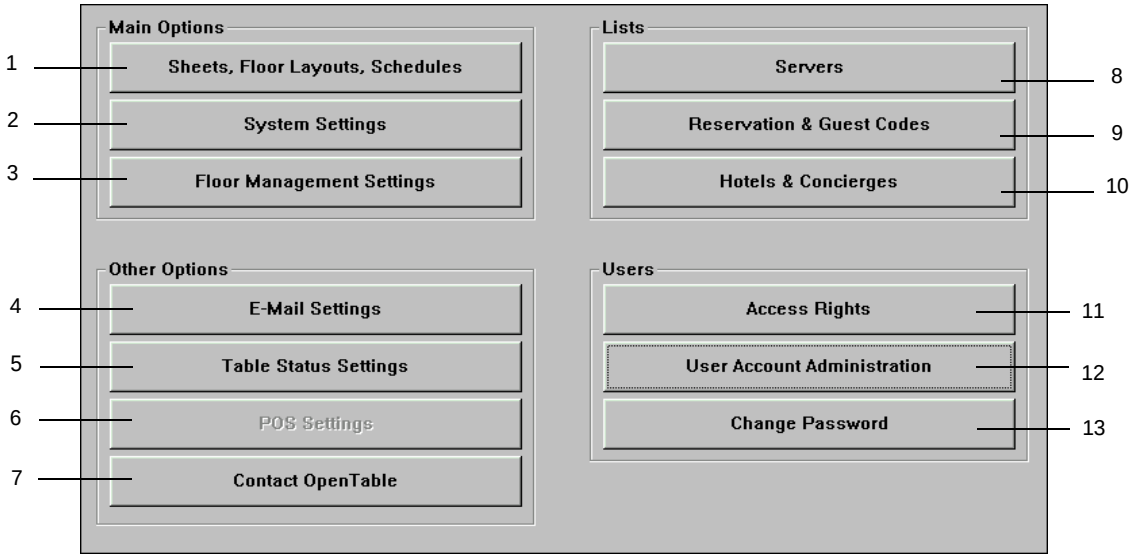


Figure 11-1: Admin View

1	Sheets, Floor Layouts, Schedules	Create, edit or view your reservation sheets, floor layouts and schedules	8	Servers	Maintain a list of servers / host staff that can be assigned to tables on the Floor View
2	System Settings	Edit restaurant information and configure general settings and reservation settings	9	Reservation & Guest Codes	Maintain a list of reservation and guest codes that can be assigned to reservations and guests
3	Floor Management	Set Floor View, Waitlist, and Chit / Guest Card settings	10	Hotels & Concierges	Maintain a list of hotels and concierges that provide guest referrals
4	E-Mail Settings	Configure E-Mail settings for sending reservation confirmations and Marketing E-Mails	11	Access Rights	Display a list of features that can be password protected in the OpenTable system
5	Table Status Settings	Set the reservation status colors and status code abbreviations	12	User Account Administration	Add, edit or delete users, disable or change passwords
6	POS Settings	Set Point of Sale integration settings (POS integration is an optional feature)	13	Change Password	Change system password
7	Contact OpenTable	Send an E-Mail to OpenTable Support for assistance or to suggest enhancements			

Main Options

The *Main Options* section contains three groups of configuration settings:

- *Sheets, Floor Layouts, Schedules* - create, change, delete and copy reservation sheets and floor layouts. Set schedules to open and close shifts and days and assign reservation sheets to open shifts.
- *System Settings* - edit the restaurant's address and telephone information, configure general settings and reservation settings.
- *Floor Management Settings* - set the floor settings, waitlist settings and chit/guest card settings.

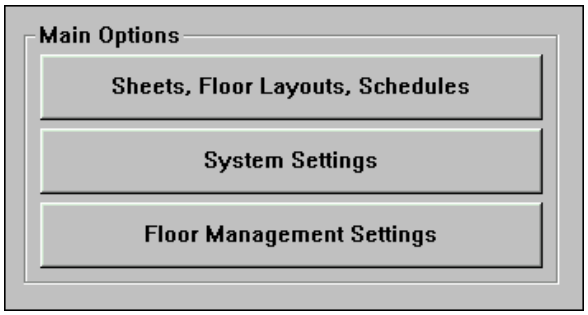


Figure 11-2: Main Options: Sheets, Floor Layouts, Schedules, System and Floor Management Settings

Lists

The *Lists* section helps you organize and manage your reservation and guest codes, servers, and hotel concierges.

- *Servers* - add, change, or delete servers and assign servers to a day and shift.
- *Reservation & Guest Codes* - add, change, or delete reservation and guest codes. Select two reservation or guest codes as your guest recognition codes for display in the *Sheet, Book,* and *Floor Views*.
- *Hotels & Concierges* - add, change, or delete a list of hotels and/or concierges.

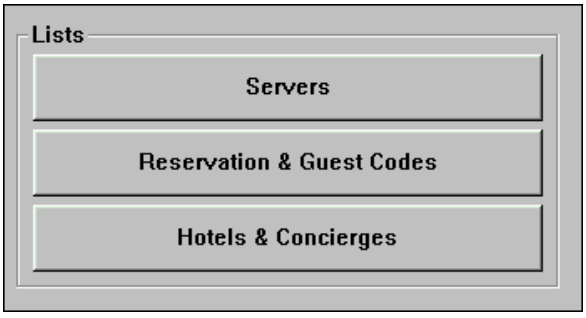


Figure 11-3: Lists: Servers, Reservation and Guest Codes, Hotels and Concierges

Other Options

You can configure E-Mail and table status settings in the *Other Options* section.

- *E-Mail Settings* - configure E-Mail settings, enter a customized message for reservation and reminder E-Mails, and import your restaurant's logo for display at the top of all phone reservation E-Mails.
- *Table Status Settings* - select and edit custom color settings for each table status.
- *POS Settings* - configure your POS (Point of Sale) integration settings. If this button is grayed out, then you do not have POS enabled in your machine.
- *Contact OpenTable* - send an urgent E-Mail or an enhancement request to *OpenTable* support.

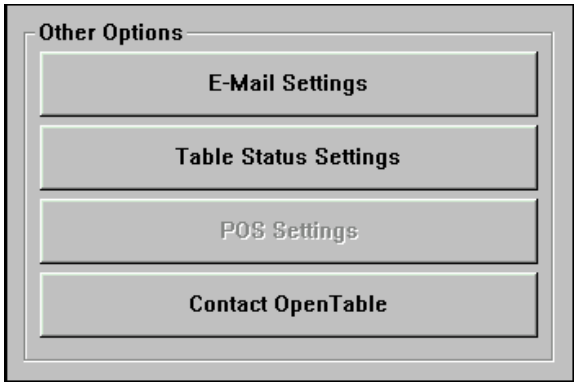


Figure 11-4: Other Options: E-Mail Settings, Table Status Settings, POS Settings, and Contact OpenTable

Users

Another key area of the *OpenTable* system is the *Users* section where you can set and control access to password protected features.

- *Access Rights* - set access rights and require a password to use certain features and functions.
- *User Account Administration* - create different user accounts that have access to some or all password protected features. You can also disable a user account and reset a password if the user forgets their password.
- *Change Password* - change your password, (requires entry of your old password).

Figure 11-5: Users: Access Rights, User Account Administration, Change Password

Chapter 12: Reservation Sheets

Introduction to Reservation Sheets

The *Sheets, Floor Layouts, Schedules Dialog* allows you to create/edit reservation sheets and floor layouts and change your schedule. When tapping the *Sheets, Floor Layouts, Schedules* button on the *Admin View*, the system displays the *Sheets, Floor Layouts, Schedules Dialog* with four tabs along the top: *Overview* (displayed by default), *Sheets, Floor Layouts, and Schedules*. Details on *Floor Layouts* and *Schedules* are covered in subsequent chapters.

The *Overview Tab* explains some of the basic building blocks of the *OpenTable* system. One of the main building blocks of the *OpenTable* system is the reservation sheet. Reservation sheets are made up of time slots that represent when the restaurant will accept dining reservations. Typically, restaurants create several different reservation sheets based on differences in their operational flow, which can be affected by the time of day, day of the week and time of year. Use the *Sheets Tab* to create and edit your reservation sheets.

Managing Reservation Sheets Using the Sheets Tab

Things You Should know About Reservation Sheets and Shifts

Reservation sheets are made up of time slots that represent when the restaurant will accept dining reservations. Typically, restaurants create several different reservation sheets based on differences in their operational flow. After creating reservation sheets, you can assign them as your Default or REGULAR Schedule or you can assign them to shifts on a specific date or date range.

There are six shifts that you can set up on any day/date: Breakfast, Brunch, Lunch, Dinner, In-House 1 and In-House 2. All shifts can start as early as 5:00 AM and can end as late as 4:45 AM (the following day). 5:00 AM is considered the beginning of a new day in the system.

The first four shifts (Breakfast, Brunch, Lunch, and Dinner) cannot be scheduled to overlap with each other. For example, scheduling a lunch shift that ends at 4:00 PM and a dinner shift that starts at 3:00 PM on the same day is not allowed because they overlap. To fix this problem, you might schedule the lunch shift to end at 4:00 PM and change your dinner shift to start at 4:15 PM.

The two In-House shifts behave differently than the other four shifts in that they can overlap and/or run concurrently with other shifts. In-House shifts are designed specifically to handle shifts and operational situations (like a casual cafe, for example) where the restaurant typically does not take reservations but only accepts walk-in guests. Therefore, all slots on In-House shifts are not available for booking by Web diners and are only available to restaurant users.

You can use the *Sheets Tab* (*Admin View / Sheets, Floor Layouts, Schedules*) to add, change and delete reservation sheets. After creating the reservation sheets, you can use the *Schedules Tab* (*Admin View / Sheets, Floor Layouts, Schedules*) to assign your reservation sheets to specific shifts.

The Sheets Tab

The *Sheets Tab* can be accessed by tapping *Admin View* on the *Side Navigation Bar* and then tapping the **Sheets, Floor Layouts, Schedules** button. This tab lists all the reservation sheets in the system along with the sheet type, shift, status, open time and close time. From this tab, you can add a new reservation sheet or change, copy, or delete an existing reservation sheet.

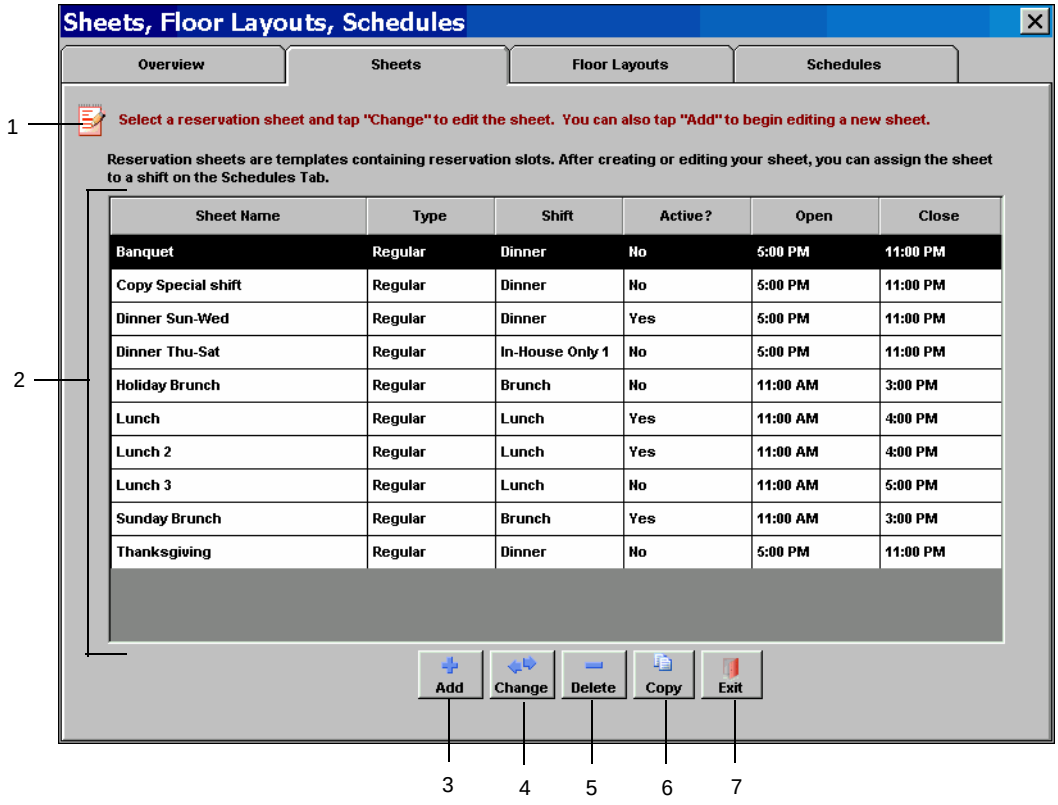

Sheets, Floor Layouts, Schedules
Overview
Sheets
Floor Layouts
Schedules
1
Select a reservation sheet and tap "Change" to edit the sheet. You can also tap "Add" to begin editing a new sheet.
Reservation sheets are templates containing reservation slots. After creating or editing your sheet, you can assign the sheet to a shift on the Schedules Tab.
2
Sheet Name | Type | Shift | Active? | Open | Close
Banquet | Regular | Dinner | No | 5:00 PM | 11:00 PM
Copy Special shift | Regular | Dinner | No | 5:00 PM | 11:00 PM
Dinner Sun-Wed | Regular | Dinner | Yes | 5:00 PM | 11:00 PM
Dinner Thu-Sat | Regular | In-House Only 1 | No | 5:00 PM | 11:00 PM
Holiday Brunch | Regular | Brunch | No | 11:00 AM | 3:00 PM
Lunch | Regular | Lunch | Yes | 11:00 AM | 4:00 PM
Lunch 2 | Regular | Lunch | Yes | 11:00 AM | 4:00 PM
Lunch 3 | Regular | Lunch | No | 11:00 AM | 5:00 PM
Sunday Brunch | Regular | Brunch | Yes | 11:00 AM | 3:00 PM
Thanksgiving | Regular | Dinner | No | 5:00 PM | 11:00 PM
Add
Change
Delete
Copy
Exit
3
4
5
6
7

Figure 12-1: Admin View / Sheets, Floor Layouts, Schedules / Sheets Tab

1	Instructions	Instructions on what to do	5	Delete	Delete an existing reservation sheet
2	Sheet List	List of all reservation sheets in the system	6	Copy	Copy an existing reservation sheet
3	Add	Add a new reservation sheet	7	Exit	Exit and return to the Admin View
4	Change	Change an existing reservation sheet			

Add Sheet and Edit Sheet Dialogs

Tapping the **Add** or **Change** buttons on the *Sheets Tab* will display the *Add Sheet* or *Edit Sheet Dialogs*. These dialogs allow you to create and change your reservation sheets.

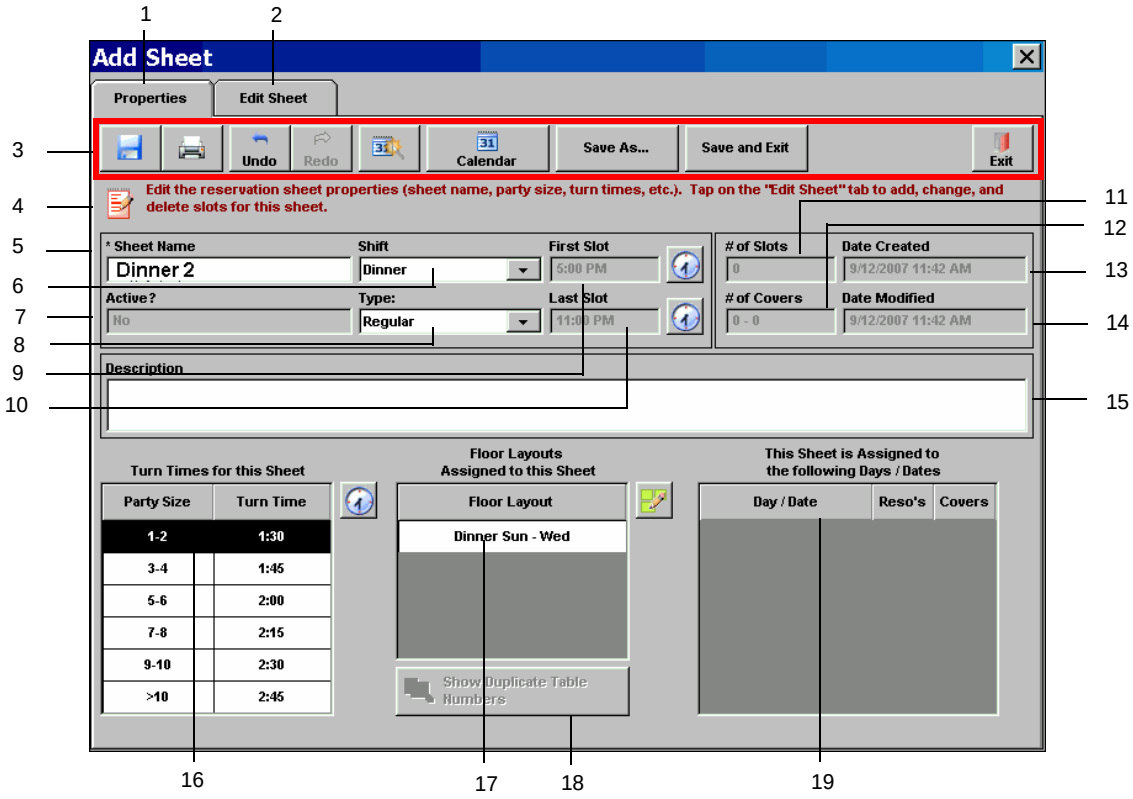


Figure 12-2: Add Sheet Dialog - Properties Tab

1	Properties	Change basic sheet properties and settings	11	# of Slots	Number of reservation slots on this sheet
2	Edit Sheet Tab	Add, change, delete reservation slots and slot attributes	12	# of Covers	Number of covers available on this sheet
3	Top Navigation Bar	Contains frequently used functions when editing reservation sheets	13	Date Created	Date and time this sheet was created
4	Instructions	Provides instructions on what to do	14	Date Modified	Date and time this sheet was last changed
5	Sheet Name	Name of this reservation sheet	15	Description	Short description of the sheet
6	Shift	Shift that the sheet is designed for (Breakfast, Brunch, Lunch, Dinner, In-House 1 & 2)	16	Turn Times	Turn time settings by party size for this sheet (tap the clock icon to change)
7	Active	Status is active if the sheet is assigned to a future day, date, or date range	17	Floor Layout Assignments	Assign floor layouts to this sheet (tap the icon to change)
8	Type	Type of sheet (regular, buyout, holiday, special event)	18	Show Duplicate Table Numbers	Identifies any duplicate table numbers across all of the assigned floor layouts
9	First Slot	Open time - time of the first slot	19	Sheet Assignments	List of future days (Sunday - Saturday), dates, or ranges that this sheet is assigned to
10	Last Slot	Close time - time of the last slot			

The *Top Navigation Bar* in the *Sheets Tab* displays buttons for frequently used functions when editing reservation sheets.

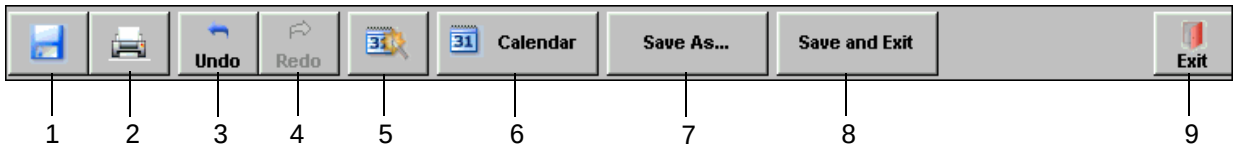


Figure 12-3: Top Navigation Bar on the Add or Edit Sheet Dialog

1	Save	Save your changes to the sheet	6	Calendar	Exit the Add or Edit Sheet Dialog and jump to the Schedules Tab / Calendar View
2	Print	Print the reservation sheet	7	Save As ...	Save a copy of this sheet with a different name
3	Undo	Undo the last command	8	Save and Exit	Save your changes and exit the dialog
4	Redo	Redo the last command	9	Exit	Exit the Add or Edit Sheet Dialog
5	Scheduling Wizard	Exit the Add or Edit Sheet Dialog and jump to the Scheduling Wizard			

Adding / Creating a Reservation Sheet

To add or create a new reservation sheet to the system:

1. Tap **Admin** on the *Side Navigation Bar*. Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Sheets Tab**.
4. Tap **Add**. The *Add Sheet Dialog* is displayed and the *Properties Tab* is selected by default.
5. Enter a name for the new sheet (sheet names must be unique) and select the *Shift* and *Type*.
6. Tap the **clock** icons to set the the start time (First slot) and end time (Last slot).
7. Tap the *Edit Sheet Tab* to begin adding and editing slots (for more information, refer to "Adding Slots to Reservation Sheets" on page 92).
8. Tap **Save** on the *Top Navigation Bar* to save your changes.

Editing a Reservation Sheet

For any existing sheet, you can add, change, or delete slots, assign floor layouts, or change the open and close times.

To edit an existing reservation sheet:

1. Tap **Admin** on the *Side Navigation Bar*. Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Sheets Tab**.
4. Select the reservation sheet you want to edit.
5. Tap **Change**. The *Edit Sheet Dialog* is displayed and the *Edit Sheet Tab* is selected by default.
6. Make your desired changes to the sheet (for more information, refer to "Editing a Reservation Sheet - Details" on page 86).
7. Tap **Save** on the *Top Navigation Bar* to save your changes.

Copying a Reservation Sheet

Instead of creating a new sheet, you can save time by copying an existing sheet and editing the copy.

To copy a reservation sheet:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Sheets Tab**.
4. Select the reservation sheet you want to copy.
5. Tap **Copy**. The *Copy Sheet Dialog* is displayed.

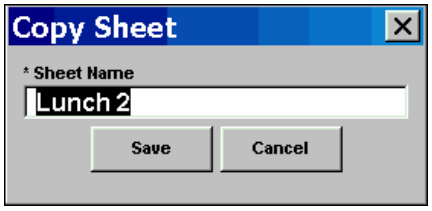


Figure 12-4: Copy Sheet Dialog

6. Enter a new name for the new sheet (sheet names must be unique) and tap **Save**.

Deleting a Reservation Sheet

To delete a reservation sheet:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Sheets Tab**.
4. Select the reservation sheet you want to delete.
5. Tap **Delete** and tap **Yes** to confirm. The reservation sheet is deleted and removed from the list.

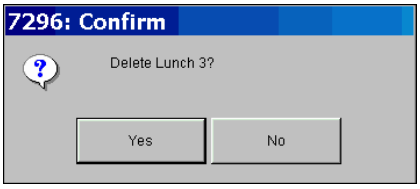


Figure 12-5: Delete Sheet Confirmation Dialog

The system will not allow you to delete a reservation sheet that is scheduled for a shift that has pending (future) reservations.

Editing a Reservation Sheet - Details

When editing a reservation sheet, you can change several specific attributes of the sheet:

- Change basic sheet settings.
- Set turn times.
- Assign floor layouts.
- Add / change / delete reservation slots.

Changing Basic Sheet Settings

The *Properties Tab* on the *Add / Edit Sheet Dialog* allows you to change basic settings for a reservation sheet, including the sheet name, shift, type, description, open and close times.

To change the basic sheet settings:

1. Load the reservation sheet that you want to edit. (For more information refer to "Editing a Reservation Sheet" on page 85.)
2. Tap the **Properties Tab**.
3. Change the *Sheet Name*. *Sheet Names* are required and must be unique.
4. Use the dropdowns to select a different *Shift* and *Type*.
5. Tap the **clock** icons to change the open time (First slot) and close time (Last slot) for the sheet.
6. Tap **Save** on the *Top Navigation Bar* to save your changes.

Setting Turn Times for the Sheet

The *Turn Times* grid on the *Properties Tab* allows you to set the estimated time that a party will take to finish dining. You can enter different turn time settings based on party size (larger parties usually have a longer turn time). The values you select here will determine the estimated time of departure (ETD) and when the floor timers change color on the *Floor View.* For more information, refer to "Floor Timers" on page 148.

To configure turn times for the sheet:

1. Load the reservation sheet that you want to edit. (For more information refer to "Editing a Reservation Sheet" on page 85.)
2. Tap the **Properties Tab**.
3. Locate the *Turn Times for this Sheet* grid in the lower left part of the dialog.

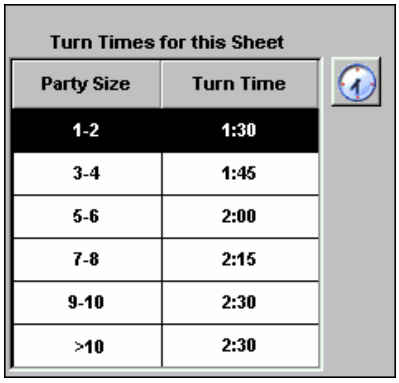


Figure 12-6: Turn Times for this Sheet Grid on the Properties Tab

4. Select the party size range you want to change in the grid.

5. Tap the **clock timer** icon next to the grid. The *Select Turn Time Dialog* is displayed.

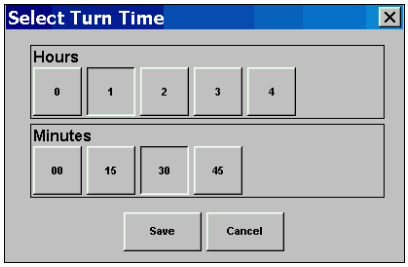


Figure 12-7: Select Turn Time Dialog

6. Tap the hours and minutes to set the turn time for that party size.
7. Tap **Save** to accept your turn time changes, close the dialog, and return to the *Properties Tab*. Repeat as necessary.
8. Tap **Save** on the *Top Navigation Bar* to save your changes.

Assigning Floor Layouts to the Sheet

Floor layouts are graphical representations of the physical layout of your tables in your restaurant. In the *OpenTable* system, you must assign floor layouts to reservation sheets in order to seat parties in the system on the *Floor View* during a shift. The connection between reservation sheets and floor layouts parallels the real world - to accommodate more diners (or reservations), you would need to open more rooms and have more tables available for seating. You can assign up to four floor layouts to one reservation sheet. When you look at that shift on the *Floor View*, each floor layout is displayed on a separate tab.

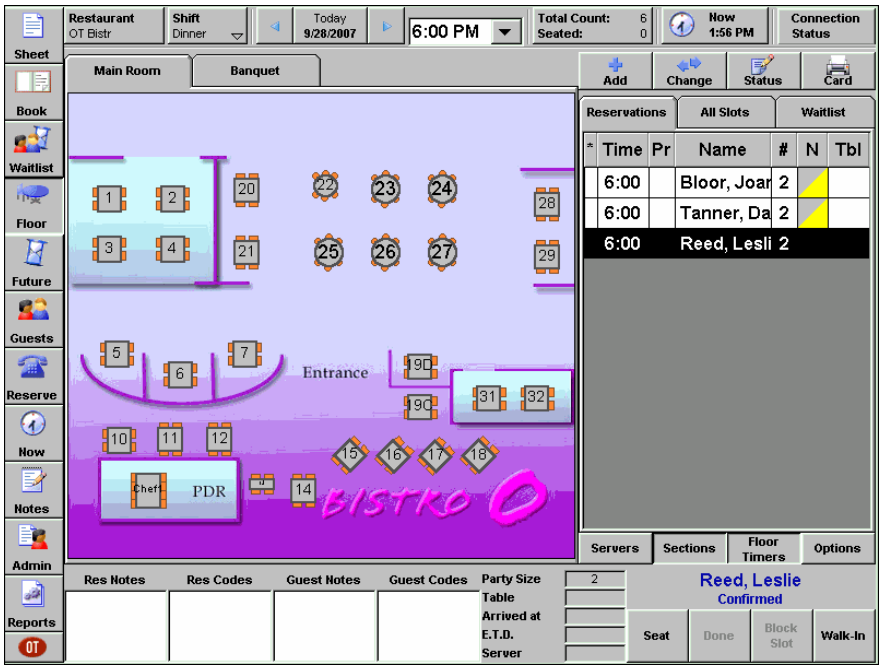


Figure 12-8: Floor Layouts Displayed on the Floor View

To assign floor layouts to the sheet:

1. Load the reservation sheet that you want to edit. (For more information refer to "Editing a Reservation Sheet" on page 85.)

2. Tap the **Properties Tab**.
3. Locate the *Floor Layouts Assigned to this Sheet* grid in the lower part of the dialog. This grid lists all the floor layouts that are currently assigned to this reservation sheet.

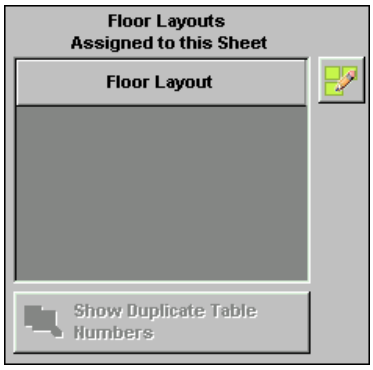


Figure 12-9: Floor Layouts Assigned to This Sheet Grid on the Properties Tab

4. Tap the **pencil** icon next to the grid. The *All Floor Layouts Dialog* is displayed.
5. Tap the *Floor Layout(s)* that you want to use in the *All Floor Layouts* list on the left. Tap the **right arrow** button to assign the highlighted floor layout(s). The layout(s) appear in the *Assigned Floor Layouts* list on the right.

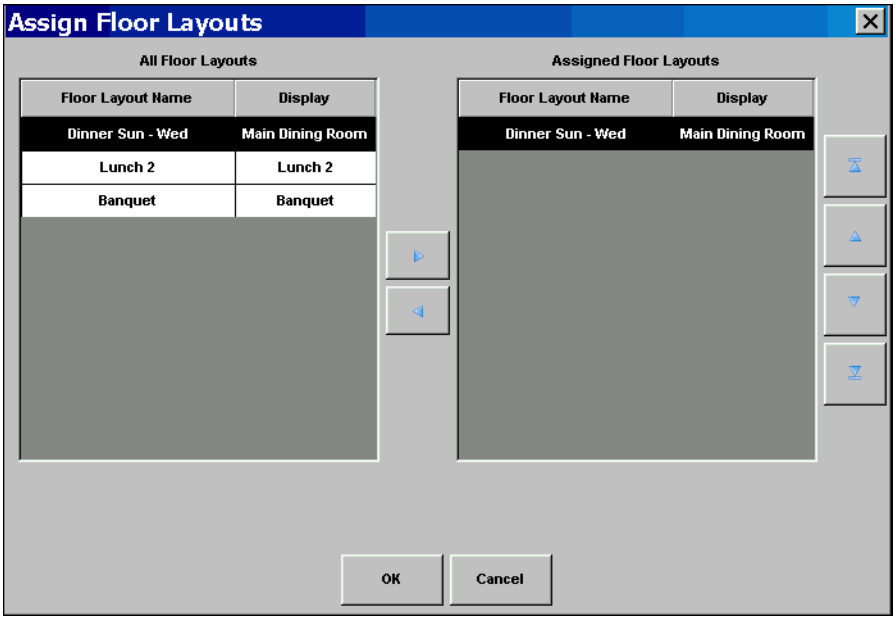


Figure 12-10: Assign Floor Layouts Dialog

6. To unassign a floor layout, tap the layout in the *Assigned Floor Layouts* list on the right and tap the **left arrow** button.
7. Tap **OK** to accept your floor layout assignments, close the dialog, and return to the *Properties Tab*. The *Floor Layouts Assigned to This Sheet* grid displays the assigned floor layouts.

8. Tap **Save** on the *Top Navigation Bar* to save your changes.

When creating and assigning floor layouts, you may mistakenly assign the same table numbers to different tables. Although the system allows this, the system will warn you if this occurs. If duplicates exist, the Show Duplicate Table Numbers button on the Add / Edit Sheet Dialog is enabled. Tap the Show Duplicate Table Numbers button to view the Duplicate Table List. You can edit the appropriate layouts to remove the duplicates.

After completing your floor layout assignments, the system will display your floor layouts on the *Floor View* whenever the reservation sheet is assigned to a shift.

Reservation Slots

Things you Should Know About Reservation Slots

Reservation slots represent the times that the restaurant plans on accepting diners at the restaurant. Each reservation slot has several attributes, including the date, time, party size minimum and maximum, and a pre-assigned table number (optional). The minimum and maximum party size settings for a reservation slot control the party sizes that can be booked on the web and through the *Reserve View*.

There are three types of reservation slots in the *OpenTable* system: *Standard Slots, Manager Slots,* and *Expiring Manager Slots* (a special type of Manager Slot).

Slot Type	Reserve from Web	Reserve from Restaurant	Requires Password to Reserve	Appearance in the System
Standard	Yes	Yes	No	Blank
Manager	No	Yes	Optional	-- Mgr Slot --
Expiring Manager	No before time expires	Yes	Optional before time expires	-- Exp Mgr (x) -

Table 12-1: Types of Slots in the OpenTable System

Standard Slots appear as blank rows in the *Sheet, Book, and Floor Views*. Any Web diner or restaurant user can book reservations into *Standard Slots*. A majority of your reservation sheets in your electronic reservation book should be made up of *Standard Slots*.

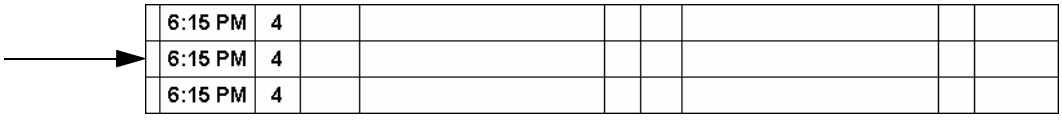


Figure 12-11: A Standard Slot on Sheet View

Manager Slots appear as rows with "-- Mgr Slot --" in the *Sheet, Book, and Floor Views*. Restaurants often configure the *OpenTable* system to prompt for a password when a restuarant user attempts to make a reservation into a *Manager Slot*. *Manager Slots* are not available for booking by Web diners. Restaurants

primarily use *Manager Slots* to save a small number of slots for last minute reservations for VIPs and special guests.

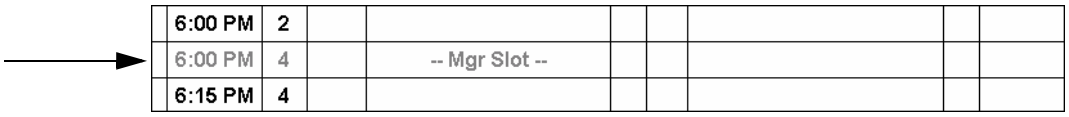


Figure 12-12: A Manager Slot on Sheet View

Expiring Manager Slots appear as rows with "-- Exp Mgr (X) --" in the *Sheet, Book, and Floor Views* where "X" represents the configured expiration time. *Expiring Manager Slots* are a special type of *Manager Slot* that are configured to "expire" and automatically change to *Standard Slots* if they are still empty a few hours or days before the reservation is supposed to take place. You can configure *Expiring Manager Slots* to expire 1, 3, 6, 12, 24,48, 72 and 96 hours before the reservation slot is supposed to take place. You can also configure *Manager Slots* to never expire. Before time expires, *Expiring Manager Slots* behave like *Manager Slots*. After time expires, they behave like *Standard Slots*.

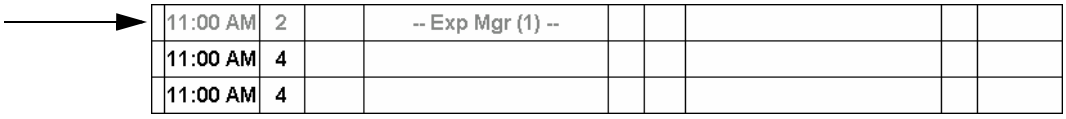


Figure 12-13: An Expiring Manager Slot Expires 1 Hour before the Reservation Slot on Sheet View

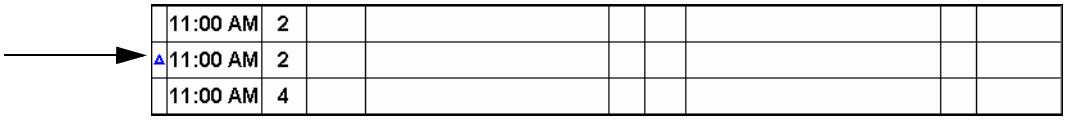


Figure 12-14: An (Expired) Expiring Manager Slot on Sheet View

More on Expiring Manager Slots

The goal of *Expiring Manager Slots* is to give you greater control over your seat / table inventory and allow you to open up slots for booking by restaurant users and Web diners. As described in previous sections, *Manager Slots* are primarily used to save a small # of slots for VIPs and special guests. *Manager Slots* are more restrictive than *Standard Slots* because they cannot be booked by Web diners and they often require restaurant users to enter a valid password in order to book them. Depending on the operational flow of the restaurant, you have the flexibility to configure the system to automatically change *Manager Slots* into *Standard Slots* by setting an expiration time for the *Manager Slots*.

Let us review an *Expiring Manager Slot* example. Assume that an empty *Manager Slot* is configured to take place 7:30 PM on a Thursday dinner shift and has an expiration time of 6 hours. The slot continues to have all the characteristics of a *Manager Slot* prior to Thursday at 1:30 PM (6 hours before the slot is scheduled to take place). If the *Manager Slot* is still not booked by Thursday at 1:30 PM, the system automatically expires the *Manager Slot* and changes it to a *Standard Slot*. This releases the slot and makes it available for booking by Web diners and restaurant users (without requiring a password).

Adding Slots to Reservation Sheets

To add slots to a reservation sheet, you need to navigate to the *Add Sheet* or *Edit Sheet Dialog*.

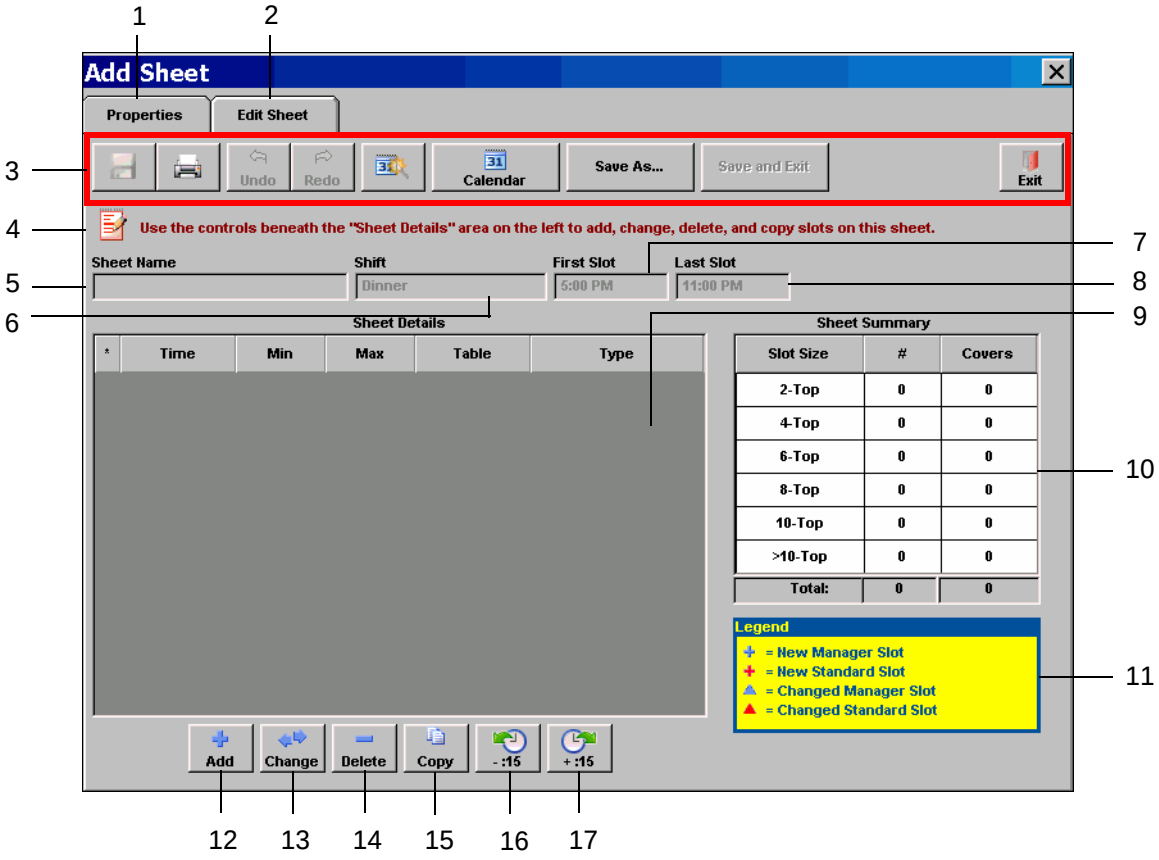


Figure 12-15: Edit Sheet Tab on the Add Sheet Dialog

1	Properties Tab	Change basic sheet properties and settings	10	Sheet Summary	Displays a list of slots by party size
2	Edit Sheet Tab	Add, change, delete reservation slots and slot attributes	11	Legend	Displays a list of symbols that appear in the "*" column and what they mean
3	Top Navigation Bar	Contains frequently used functions when editing reservation sheets	12	Add	Add one or more new slot(s) to the sheet
4	Instructions	Provides instructions on what to do	13	Change	Change the attributes of the highlighted slot(s)
5	Sheet Name	Name of this reservation sheet	14	Delete	Delete the highlighted slot(s)
6	Shift	Shift that the sheet is designed for (Breakfast, Brunch, Lunch, Dinner, In-House 1 & 2)	15	Copy	Copy the highlighted slot(s)
7	First Slot	Open time - time of the first slot	16	- :15	Shift the highlighted slot(s) to start 15 minutes earlier than their current setting
8	Last Slot	Close time - time of the last slot	17	+ :15	Shift the highlighted slot(s) to start 15 minutes later than their current setting
9	Sheet Details	Displays all reservation slots for this sheet			

To add slots to your sheet:

1. Load the reservation sheet that you want to edit. (For more information refer to "Editing a Reservation Sheet" on page 85.)
2. On the *Edit Sheet Tab*, tap the **Add** button. The *Add Slot(s) Dialog* is displayed.

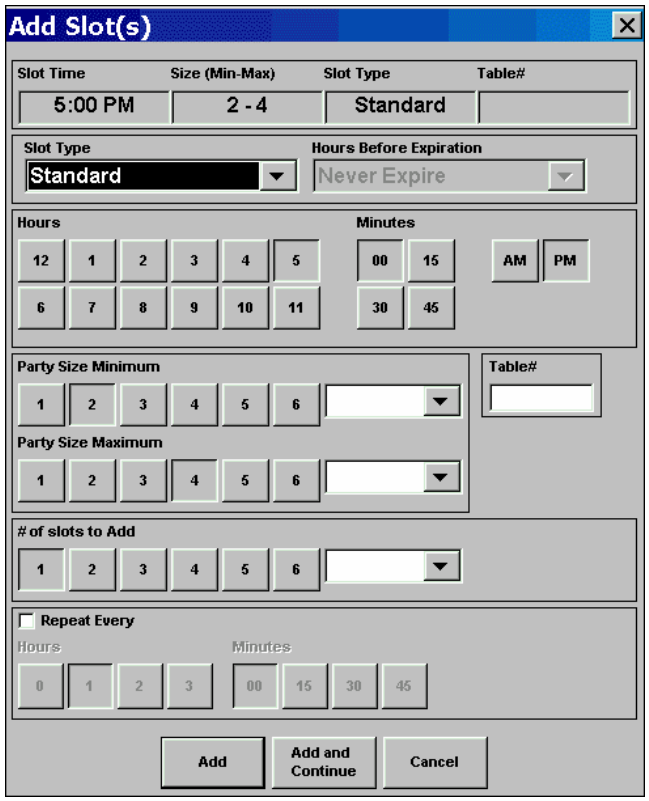


Figure 12-16: Add Slot(s) Dialog

3. Set the slot's attributes, including time, party size minimum and maximum, table number, and slot type (*Standard* or *Manager*).
4. If you choose to add a *Manager Slot*, then the *Hours Before Expiration* dropdown is enabled and you can configure the slot to be an *Expiring Manager Slot* by setting the expiration time. You can also set the expiration time to never expire.

   If you want to choose a party size > 6, use the party size dropdown menus to select or enter a different party size.
5. Choose how many slots to create. If you want the slots to repeat over a certain time interval (for example, add four deuces starting at 5:00 PM AND repeat the slots every hour), check the **Repeat Every** checkbox at the bottom of the *Add Slot(s) Dialog* and select the time interval.
6. Tap the **Add** button to finish. The *Add Slot(s) Dialog* is closed and the new slots are added to the sheet and continue to be highlighted. A plus sign (+) is displayed in the "*" column next to the new slots to indicate that the slots were added.
7. Review your changes in the *Sheet Details* and *Sheet Summary* areas. Repeat as necessary.

8. Tap **Save** on the *Top Navigation Bar* to save your changes. All symbols in the "*" column are cleared.

If you tap Add and Continue instead of Add on the Add Slot(s) Dialog, the slots are added but the Add Slot(s) Dialog continues to be displayed for you to add more slots.

Changing One Slot on a Reservation Sheet

To change a slot on your reservation sheet:

1. Load the reservation sheet that you want to edit. (For more information refer to "Editing a Reservation Sheet" on page 85.)
2. On the *Edit Sheet Tab*, select the slot you want to change and tap the **Change** button. The *Edit Slot Dialog* is displayed.

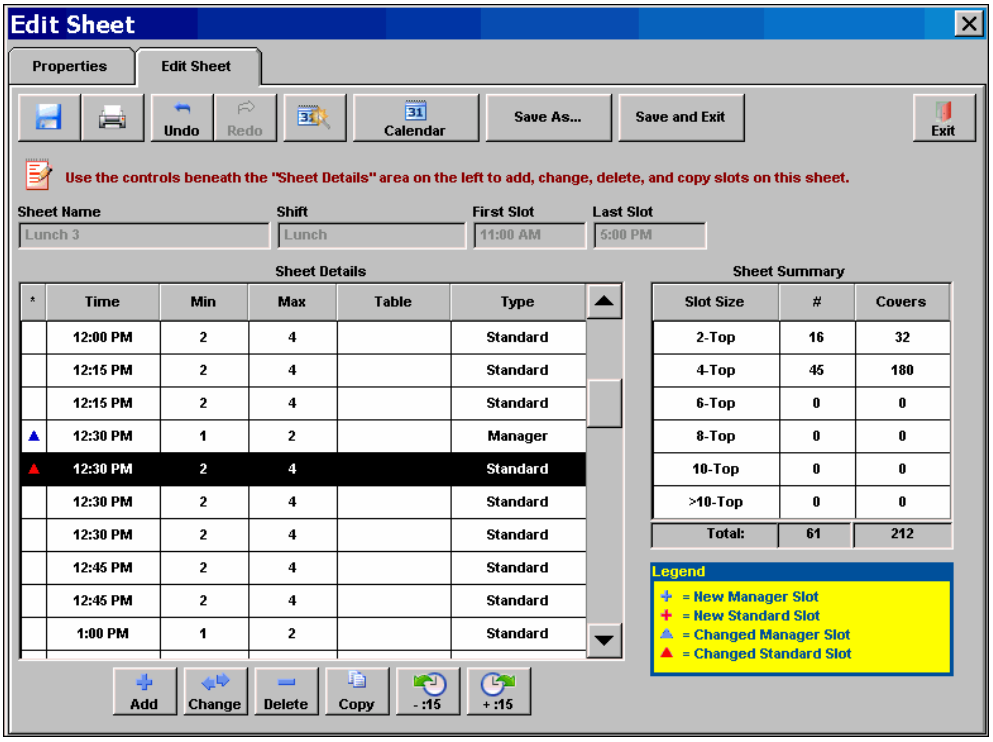


Figure 12-17: Edit Sheet Tab on the Edit Sheet Dialog

3. Set the slot's attributes (slot type, time, party size minimum and maximum, and table number).

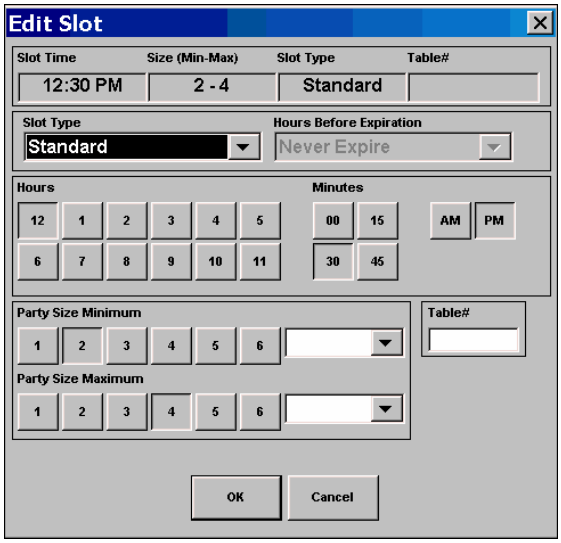


Figure 12-18: Edit Slot Dialog (One Slot Selected)

4. Tap the **OK** button to finish. The slot is changed and a solid triangle (red for *Standard Slots*, blue for *Manager Slots*) is displayed in the "*" column next to it. Repeat as necessary.
5. Tap **Save** on the *Top Navigation Bar* to save your changes. All symbols in the "*" column are cleared.

Changing Multiple Slots on a Reservation Sheet

To change more than one slot on your reservation sheet:

1. Load the reservation sheet that you want to edit. (For more information refer to "Editing a Reservation Sheet" on page 85.)
2. On the *Edit Sheet Tab*, select all the slots you want to change by **Ctrl-Tapping** individual slots or **Shift-Tapping** a block of slots. Tap the **Change** button.

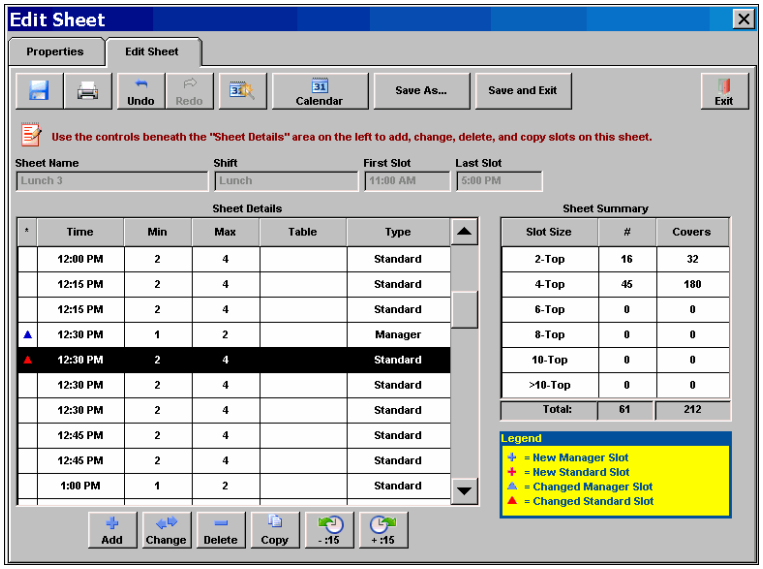


Figure 12-19: Edit Sheet Tab on the Edit Sheet Dialog

3. The *Edit Slots Dialog* is displayed. Check the box next to the attribute you want to change for all selected slots and make your changes.

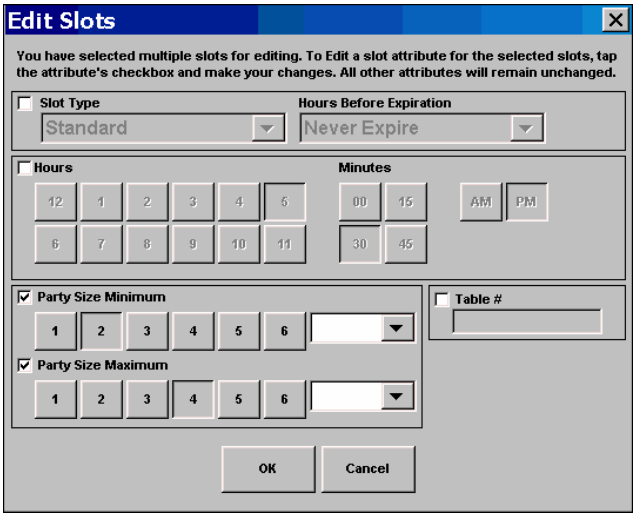

Edit Slots
You have selected multiple slots for editing. To Edit a slot attribute for the selected slots, tap the attribute's checkbox and make your changes. All other attributes will remain unchanged.
Slot Type
Standard
Hours Before Expiration
Never Expire
Hours
12 1 2 3 4 5 6 7 8 9 10 11
Minutes
00 15 30 45
AM PM
Party Size Minimum
1 2 3 4 5 6
Party Size Maximum
1 2 3 4 5 6
Table #
OK
Cancel

Figure 12-20: Edit Slot Dialog (Multiple Slots Selected)

4. Tap **OK** to finish. The changed attribute(s) are set for all the selected slots. All other attributes remain unchanged. A solid triangle (red for *Standard Slots*, blue for *Manager Slots*) is displayed in the "*" column next to all changed slots. Repeat as necessary.
5. Tap **Save** on the *Top Navigation Bar* to save your changes. All symbols in the "*" column are cleared.

Copying Slots on a Reservation Sheet

To copy slots on your reservation sheet:

1. Load the reservation sheet that you want to edit. (For more information refer to "Editing a Reservation Sheet" on page 85.)
2. On the *Edit Sheet Tab*, select all the slots you want to copy by **Ctrl-Tapping** individual slots or **Shift-Tapping** a block of slots.
3. Tap the **Copy** button. The slots are copied. A plus sign (red for *Standard Slots*, blue for *Manager Slots*) is displayed in the "*" column next to all copied slots. Repeat as necessary.
4. Tap **Save** on the *Top Navigation Bar* to save your changes. All symbols in the "*" column are cleared.

Deleting Slots on a Reservation Sheet

To delete slots on your reservation sheet:

1. Load the reservation sheet that you want to edit. (For more information refer to "Editing a Reservation Sheet" on page 85.)
2. On the *Edit Sheet Tab*, select all the slots you want to delete by **Ctrl-Tapping** individual slots or **Shift-Tapping** a block of slots.
3. Tap the **Delete** button. The slots are deleted.
4. Tap **Save** on the *Top Navigation Bar* to save your changes.

Symbols in the "*" Column

When editing slots for a reservation sheet, symbols in the "*" column on the left side of the *Sheet Details* area act as visual indicators of added or changed slots during your edit session. A plus (+) indicates an added slot and a triangle indicates a changed slot. Red symbols are for *Standard Slots* and blue symbols

are for *Manager Slots*. Once you have saved the reservation sheet, all the symbols in the "*" column are cleared.

Symbol in "*" Column	Slot Type	Appearance in the System
	Added Standard Slot	Solid Red "+" sign
	Added Manager Slot	Solid Blue "+" sign
	Changed Standard Slot	Solid Red Triangle
	Changed Manager Slot	Solid Blue Triangle

Table 12-2: Legend of Symbols When Adding and Changing Reservation Slots

Chapter 13: Floor Layouts

Floor layouts are computer representations of the restaurant's floor and table locations that are displayed on the *Floor View* for seating guests during a shift. Typically, restaurants create several different floor layouts based on differences in how tables are laid out on the floor. For example, some holidays and restaurant special events may require the restaurant to reconfigure the layout of the dining room. After creating floor layouts, you can assign them to reservation sheets using the *Sheets Tab*. You can then assign the reservation sheets to shifts using the *Schedules Tab* or the *Scheduling Wizard*.

Managing Floor Layouts Using the Floor Layouts Tab

The *Floor Layouts Tab* can be accessed by tapping *Admin View* on the *Side Navigation Bar* and then tapping the **Sheets, Floor Layouts, Schedules** button. The *Floor Layouts Tab* lists all the floor layouts in the system along with the display name (that appears on the tabs in the *Floor View*) and some additional information about each of the floor layouts.

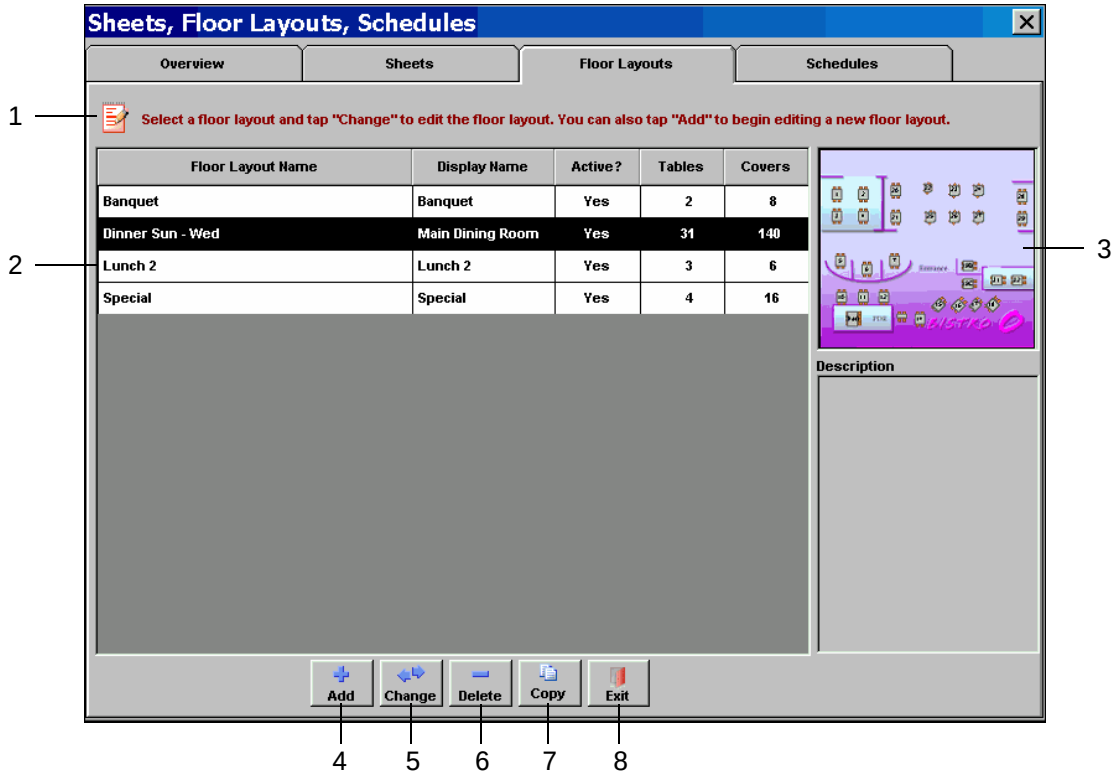


Figure 13-1: Admin View / Sheets, Floor Layouts, Schedules / Floor Layouts Tab

1	Instructions	Provides instructions on what to do	5	Change	Change an existing floor layout
2	Layout List	List of all floor layouts in the system	6	Delete	Delete an existing floor layout
3	Preview	Preview of the selected floor layout	7	Copy	Copy an existing floor layout
4	Add	Add a new floor layout	8	Exit	Exit and return to the Admin View

Making Floor Layout Changes

Add / Edit Floor Layout Dialog

Tapping the **Add** or **Change** buttons on the *Floor Layouts Tab* will display the *Add Floor Layout* or *Edit Floor Layout Dialogs*. These dialogs have two tabs (the *Properties* and *Edit Floor Layout Tabs*) that allow you to create and change your floor layouts.

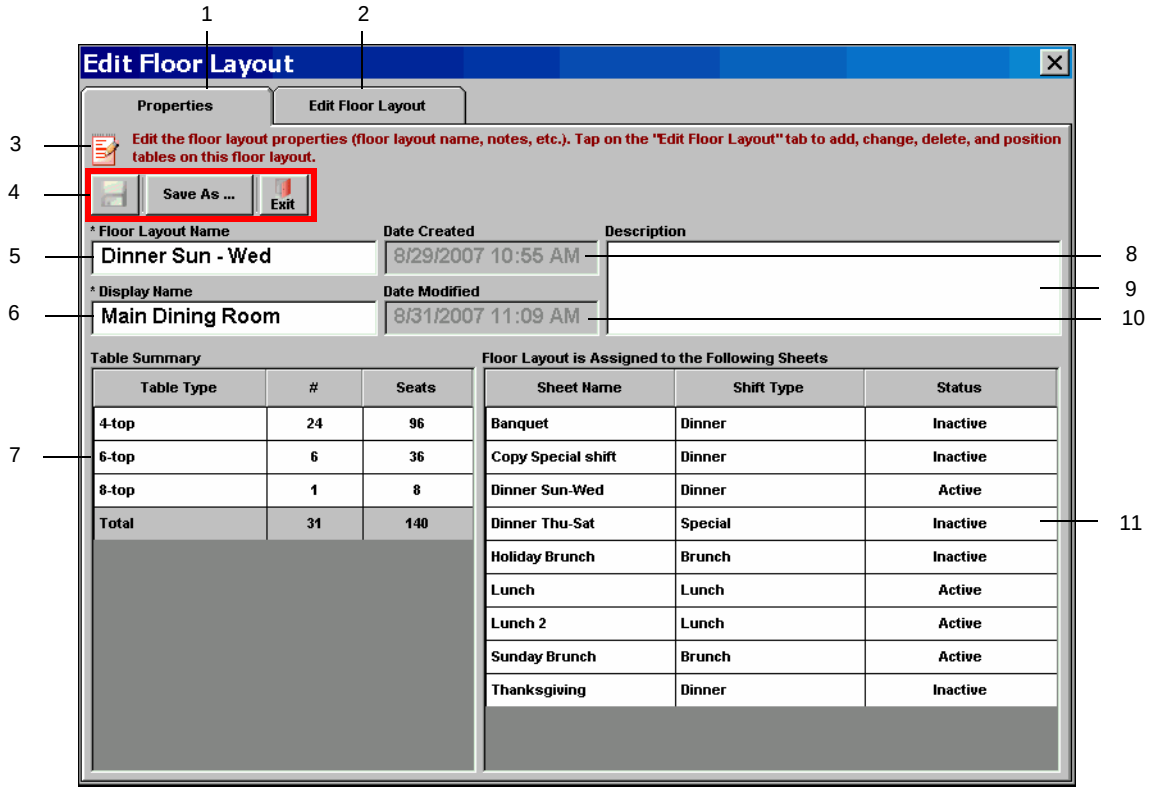


Figure 13-2: Edit Floor Layout - Properties Tab

1	Properties Tab	Change basic floor layout properties and settings	7	Table Summary	List of different table types on the layout
2	Edit Floor Layout Tab	Add, change, delete, and position tables on the layout	8	Date Created	Date and time this layout was created
3	Instructions	Provides instructions on what to do	9	Description	Short description of the layout
4	Save / Exit controls	Save your layout changes. Save As saves this layout with a different name. Exit and return to the Floor Layouts Tab	10	Date Modified	Date and time this layout was last changed
5	Floor Layout Name	Name of this floor layout	11	Floor Layout is Assigned to ...	List of reservation sheets that this floor layout is assigned to
6	Display Name	Name displayed on the Floor View tabs			

Adding / Creating a Floor Layout

To add or create a new floor layout to the system:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Floor Layouts Tab**.
4. Tap **Add**. The *Add Floor Layout Dialog* is displayed and the *Properties Tab* is selected by default.
5. Enter a *Floor Layout Name* for the new layout (layout names must be unique).
6. Enter a *Display Name* for the new layout. This is the name displayed on the *Floor View Tabs*.
7. Tap the **Edit Floor Layout Tab** to begin adding and editing tables. (For more information, refer to "Editing a Floor Layout - Details" on page 101.) You must have at least one table on the layout in order to save the layout.
8. Tap **Save** to save your new layout.

Editing a Floor Layout

For any existing layout, you can add, change, delete and position tables, hide or display chairs on the tables, position floor timers, or work with floor layout background pictures.

To edit an existing floor layout:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Floor Layouts Tab**.
4. Select the floor layout you want to edit.
5. Tap **Change**. The *Edit Floor Layout Dialog* is displayed and the *Edit Floor Layout Tab* is selected by default.
6. Make your desired changes to the layout. (For more information, refer to "Editing a Floor Layout - Details" on page 101.)
7. Tap **Save** to save your changes.

Copying a Floor Layout

Instead of creating a new layout, you can save time by copying an existing layout and editing the copy.

To copy a floor layout:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Floor Layouts Tab**.
4. Select the floor layout you want to copy.
5. Tap **Copy**. The *Copy Floor Layout Dialog* is displayed.

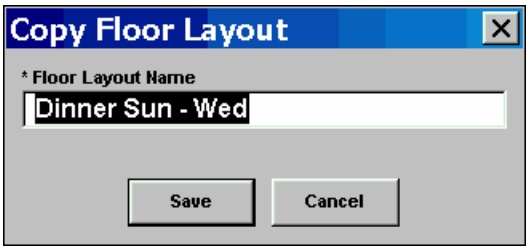


Figure 13-3: Copy Floor Layout Dialog

6. Enter a new name for the new layout (layout names must be unique) and tap **Save**.

Deleting a Floor Layout

To delete a floor layout:

1. Tap **Admin** on the *Side Navigation Bar*. Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Floor Layouts Tab**.
4. Select the floor layout you want to delete.
5. Tap **Delete** and tap **Yes** to confirm. The floor layout is deleted and removed from the list.

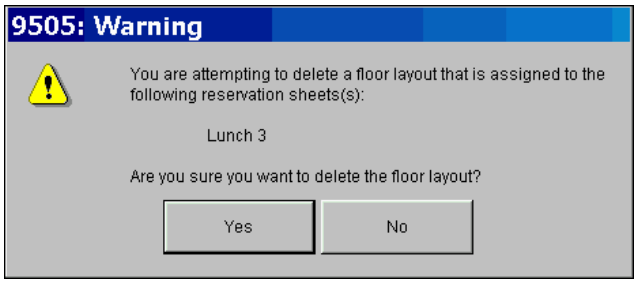

9505: Warning
You are attempting to delete a floor layout that is assigned to the following reservation sheets(s):
Lunch 3
Are you sure you want to delete the floor layout?
Yes
No

Figure 13-4: Delete Layout Confirmation Dialog

Editing a Floor Layout - Details

When editing a floor layout, you can change several specific attributes of the layout:

- Add, change, delete, and position tables on the floor layout.
- Position floor timers on the floor layout.
- Rotate the entire floor layout.
- Import, modify, and assign a background picture to the floor layout.

Adding Tables to a Floor Layout

To add tables to a floor layout, you need to navigate to the *Sheets, Floor Layouts, Schedules Dialog* and tap the **Floor Layouts Tab** at the top. Select a floor layout from the list for editing or create a new layout.

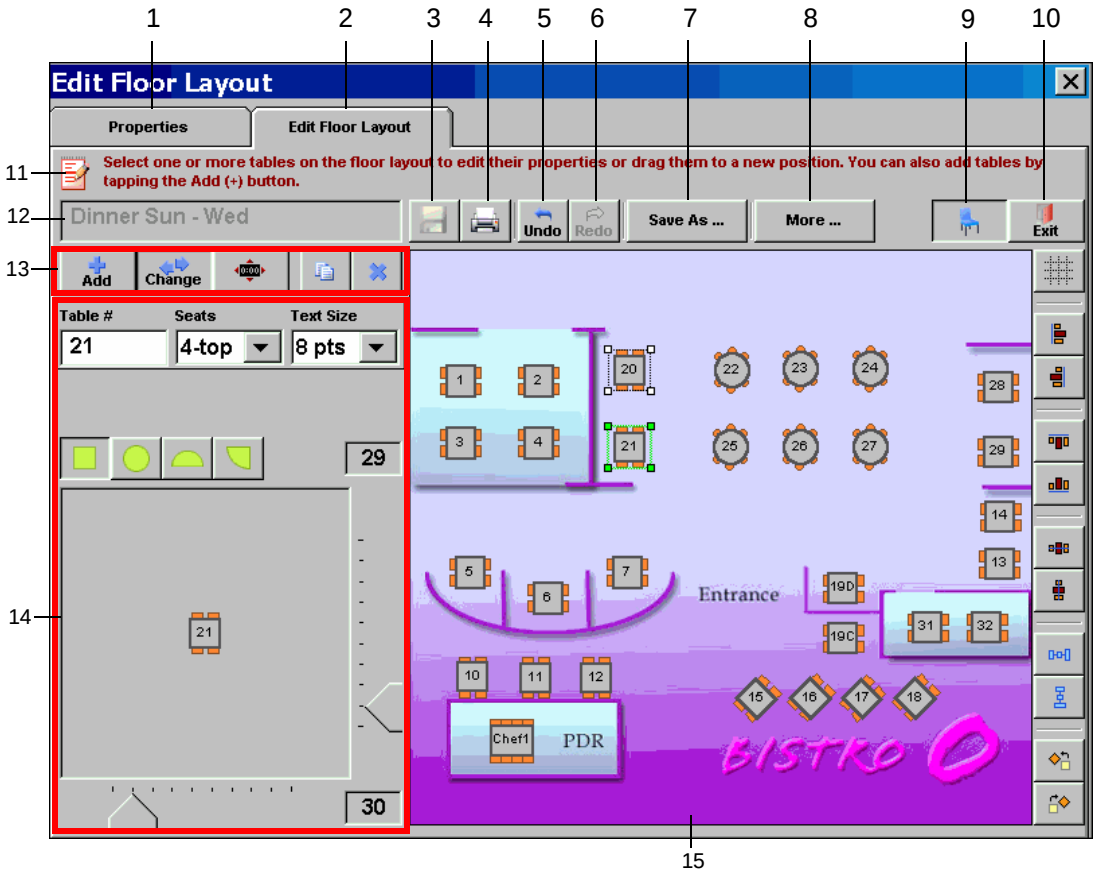


Figure 13-5: Edit Floor Layout Dialog - Edit Floor Layout Tab

1	Properties Tab	Change basic floor layout properties and settings	9	Chairs	Hide or display chairs on all tables
2	Edit Floor Layout Tab	Add, change, delete, and position tables on the floor layout	10	Exit	Exit the Add or Edit Floor Layout Dialog
3	Save	Save the floor layout	11	Instructions	Provides instructions on what to do
4	Print	Print the floor layout	12	Layout Name	Name of this Floor Layout
5	Undo	Undo the last command	13	Top Navigation Bar	Contains frequently used functions when editing floor layouts (add, change, copy, delete and add/remove floor timers)
6	Redo	Redo the last command	14	Edit Pane	Set table attributes. The pane changes, depending on the selected action
7	Save As...	Save a copy of this floor layout with a different name	15	Floor Layout Pane	Create, edit, and delete tables in the floor layout pane
8	More...	See additional functions			

Adding Tables to a Floor Layout

To add tables to a floor layout:

1. Load the floor layout that you want to edit. (For more information, refer to "Editing a Floor Layout" on page 100.)
2. On the *Edit Floor Layout Dialog*, make sure the *Edit Floor Layout Tab* is selected and tap **Add** on the *Top Navigation Bar*. The *Edit Pane* on the left of the dialog changes to display the *Add Table* controls.

Figure 13-6: Edit Floor Layouts Dialog - Add (Tables) Button on the Top Navigation Bar

3. Use the controls at the top of the *Edit Pane* to set the table attributes. As you set the table attributes, the preview image at the bottom of the *Edit Pane* changes to reflect the settings. You can:
   - Enter a Table # in the Table # field (max 5 characters).
   - Select the number of seats for the table using the Seats dropdown control.
   - Select how many tables to add using the - / + controls.
   - Select the shape of the table using the shapes buttons just above the table preview image.
   - Change the size of the table using the slider controls to the right and below the preview image of the table. You can also tap the height and width dimensions in the upper and lower right corners of the preview image and enter specific values for the height and width.

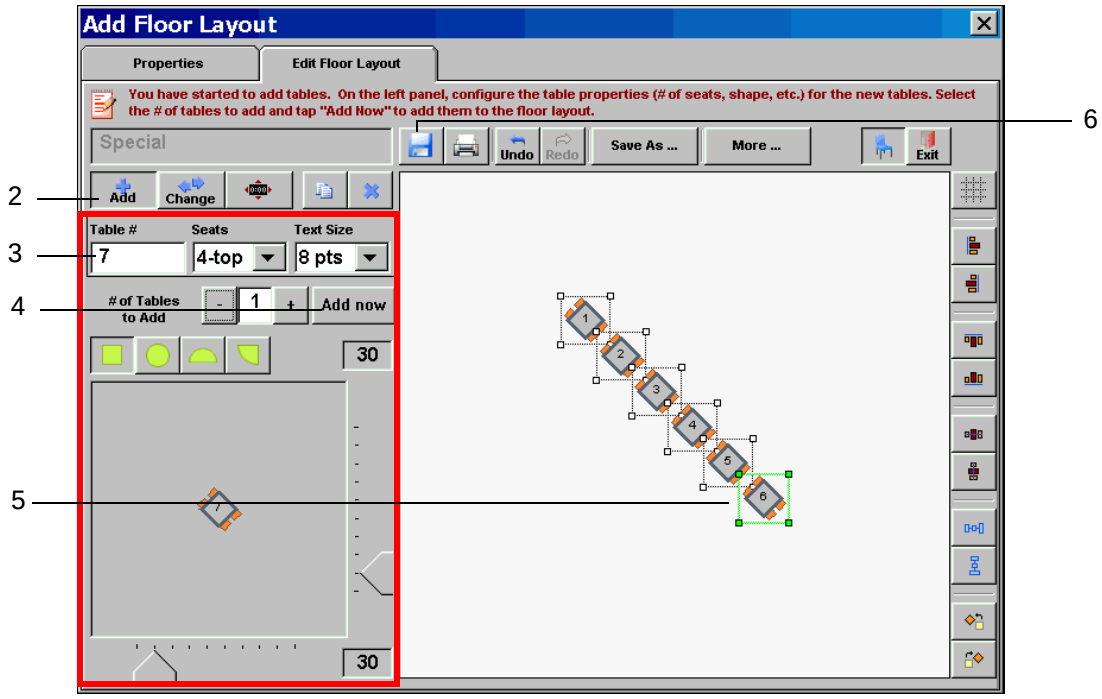


Figure 13-7: Edit Floor Layout Dialog - Edit Pane for Adding Tables

4. Tap **Add Now**. The tables are added in the top left corner of the *Floor Layout Pane*. The *Add* button is unselected and the *Change* button is immediately selected. Repeat as necessary.
5. Tap and drag your tables to position them on the layout.
6. Tap **Save** to save your changes.

Changing Table (and Table Attributes) on a Floor Layout

To change tables and table attributes on a floor layout:

1. Load the the floor layout that you want to edit. (For more information, refer to "Editing a Floor Layout" on page 100.)
2. On the *Edit Floor Layout Tab* on the *Edit Floor Layout Dialog*, tap **Change** on the *Top Navigation Bar*. The *Edit Pane* on the left of the dialog changes to display the *Change Table* controls.
3. Select one or more tables on the layout. You can do this by **Ctrl-tapping** or **Shift-tapping** tables to select multiple tables. You can also tap and drag a selection box around multiple tables on the layout. All tables within the selection box are selected and a preview image of the last table selected is displayed in the *Edit Pane* on the left.

Selected tables are surrounded by a dotted line rectangular box with squares at each of the four corners. When selecting multiple tables, the last table selected has the focus and the rectangular box and squares are green. The Edit Pane on the left displays attributes and a preview image of the last selected table.

4. Use the controls at the top of the *Edit Pane* to set the table attributes of the selected tables. You can:
   - Enter a Table # in the Table # field (max 5 characters).
   - Select the number of seats for the table using the Seats dropdown control.
   - Select the shape of the table using the shapes buttons just above the table preview image.
   - Change the size of the table using the slider controls to the right and below the preview image of the table. You can also tap the height and width dimensions in the upper and lower right corners of the preview image and enter specific values for the height and width.

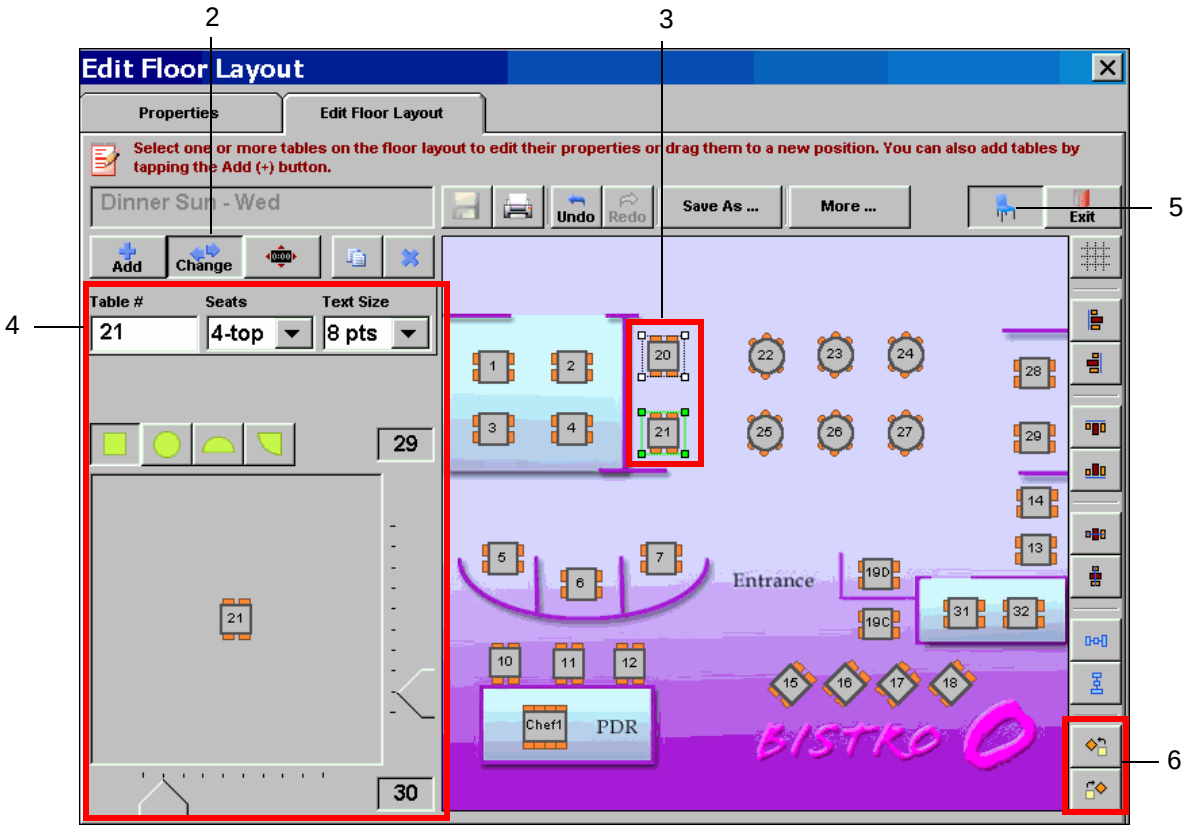


Figure 13-8: Edit Floor Layout Dialog - Changing Tables and Table Attributes on a Floor Layout

5. You can tap the **Chair** icon to either show or hide chairs on all tables on the floor layout.
6. You can use the rotate buttons on the toolbar on the right to rotate the selected tables 45 degrees counterclockwise or clockwise.
7. Tap and drag your tables to position them on the layout in the *Floor Layout Pane*. You can use the arrow keys on your keyboard to make micro adjustments and move the tables one pixel at a time.
8. Tap **Save** to save your changes.

You cannot save a floor layout if you have overlapping tables on the layout. Overlapping tables are highlighted in red on the layout. To correct the problem, move the tables so that they do not overlap and then tap Save to save your changes. Also check to make sure you don't have tables hidden underneath other tables.

Copying Tables on a Floor Layout

To copy tables on a floor layout:

1. Load the floor layout that you want to edit. (For more information, refer to "Editing a Floor Layout" on page 100.)
2. Select one or more tables on the layout. You can do this by **Ctrl-tapping** or **Shift-tapping** tables to select multiple tables. You can also tap and drag a selection box around multiple tables on the layout. All tables within the selection box are selected and a preview image of the last table selected is displayed in the *Edit Pane* on the left.
3. Tap **Copy** on the *Top Navigation Bar*. The selected tables are copied and positioned in the top left corner of the *Floor Layout Pane*.

Selected tables are surrounded by a dotted line rectangular box with squares at each of the four corners. When selecting multiple tables, the last table selected has the focus and the rectangular box and squares are green. The Edit Pane on the left displays attributes and a preview image of the last selected table.

4. Tap and drag your tables to position them on the layout in the *Floor Layout Pane*. You can use the arrow keys on your keyboard to move the tables five pixels at a time. Or use the **Ctrl-arrow** keys to make micro adjustments and move the tables one pixel at a time.
5. Tap **Save** to save your changes.

Deleting Tables from a Floor Layout

To delete tables from a floor layout:

1. Load the floor layout that you want to edit. (For more information, refer to "Editing a Floor Layout" on page 100.)
2. Select one or more tables on the layout. You can do this by **Ctrl-tapping** or **Shift-tapping** tables to select multiple tables. You can also tap and drag a selection box around multiple tables on the layout. All tables within the selection box are selected and a preview image of the last table selected is displayed in the *Edit Pane* on the left.
3. Tap **Delete** on the *Top Navigation Bar*. The highlighted tables are deleted from the *Floor Layout Pane*. You can also press the **Delete** key on your keyboard to delete the tables.
4. Tap **Save** to save your changes.

Positioning Tables on a Floor Layout

The *Edit Floor Layout Tab* on the *Add / Edit Floor Layout Dialogs* allows you to move tables on the floor layout by selecting and dragging them to a new position. Use the toolbar on the right side of the dialog to align multiple tables.

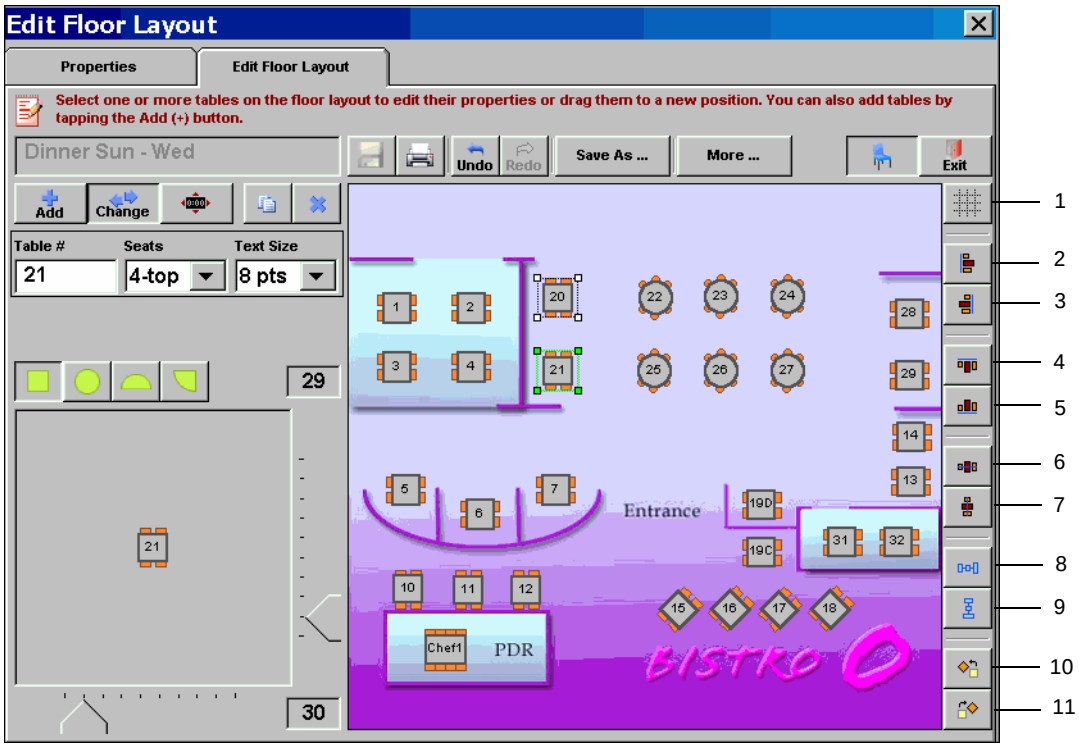


Figure 13-9: Edit Floor Layout Tab - Table Alignment Toolbar

1	Grid	Hide or display grid lines in the Floor Layout pane to aid in table placement	7	Align Center (Vertical)	Align selected tables on their centers vertically
2	Align Left	Align selected tables on the left edge	8	Distribute (Horizontal)	Distribute selected tables evenly across a horizontal axis
3	Align Right	Align selected tables on the right edge	9	Distribute (Vertical)	Distribute selected tables evenly across a vertical axis
4	Align Top	Align selected tables on the top edge	10	Rotate Left	Rotate selected tables counterclockwise 45 degrees
5	Align Bottom	Align selected tables on the bottom edge	11	Rotate Right	Rotate selected tables clockwise 45 degrees
6	Align Center (Horizontal)	Align selected tables on their centers horizontally			

To change the position of tables on the floor layout:

1. Load the floor layout that you want to edit. (For more information, refer to "Editing a Floor Layout" on page 100.)

2. On the *Edit Floor Layout Tab* on the *Edit Floor Layout Dialog*, tap **Change** on the *Top Navigation Bar*. The *Edit Pane* on the left of the dialog changes to display the *Change Table* controls.

Figure 13-10: Edit Floor Layout Dialog - Change (Tables) Button on the Top Navigation Bar

3. Select one or more tables on the layout. You can do this by **Ctrl-tapping** or **Shift-tapping** tables to select multiple tables. You can also tap and drag a selection box around multiple tables on the layout. All tables within the selection box are selected and a preview image of the last table selected is displayed in the *Edit Pane* on the left.

Selected tables are surrounded by a dotted line rectangular box with squares at each of the four corners. When selecting multiple tables, the last table selected has the focus and the rectangular box and squares are green. The Edit Pane on the left displays attributes and a preview image of the last selected table.

4. To re-position the selected tables, drag the tables to their new location in the *Floor Layout Pane*. You can use the arrow keys on your keyboard to move the tables five pixels at a time. Use the **Ctrl-arrow** keys to make micro adjustments and move the tables one pixel at a time.
5. You can tap one of the alignment buttons on the toolbar on the right side of the dialog to align the selected tables on the right, left, top, bottom edges or centers of the selected tables.
6. Tap **Save** to save all your changes.

Positioning Floor Timers on a Floor Layout

Floor timers can be displayed on the *Floor View* for all seated tables. Depending on how the system is configured, the timers either show how long a party has been dining or how much time remains before they are expected to leave. The *Edit Floor Layout Tab* on the *Add / Edit Floor Layout Dialogs* allows you to change the floor timer positions relative to the table positions on the *Floor View*.

To change the position of the floor timers:

1. Load the floor layout that you want to edit. (For more information, refer to "Editing a Floor Layout" on page 100.)
2. On the *Edit Floor Layout Tab* on the *Edit Floor Layout Dialog*, tap **Floor Timers** on the *Top Navigation Bar*. The *Edit Pane* on the left of the dialog changes to display the *Floor Timer* position of the currently selected table. Floor timers are displayed for all tables on the layout in the *Floor Layout Pane*.

Figure 13-11: Edit Floor Layout Dialog - Floor Timers Button on the Top Navigation Bar

3. Select one or more tables on the layout. You can do this by **Ctrl-tapping** or **Shift-tapping** tables to select multiple tables. You can also tap and drag a selection box around multiple tables on the layout.

All tables within the selection box are selected and a preview image of the last table selected is displayed in the edit pane on the left.

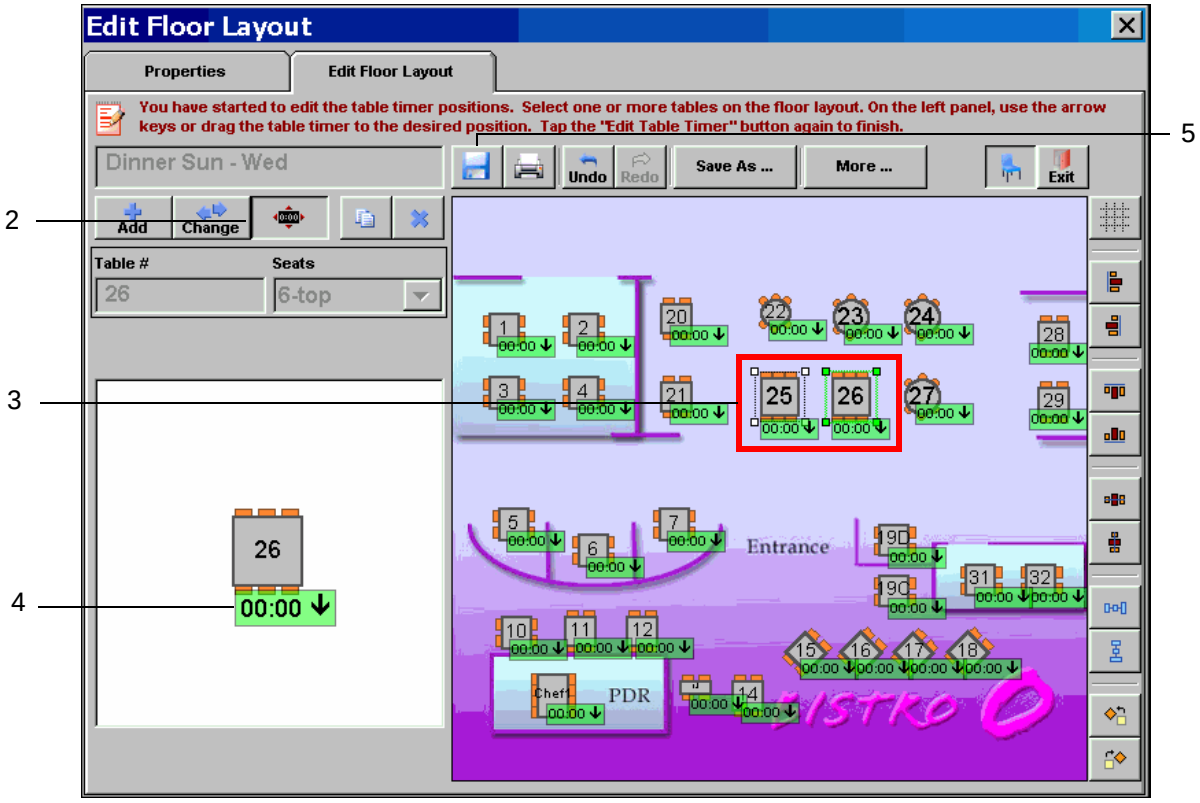


Figure 13-12: Positioning Floor Timers Using the Edit Pane

4. To re-position the floor timers for the selected tables, tap and drag the floor timer to its new location in the *Edit Pane* on the left side of the dialog. All the floor timers for the selected tables are re-positioned. You can use the arrow keys on your keyboard to make micro adjustments and move the floor timer one pixel at a time.
5. Tap **Save** to save all your changes.

Rotating the Entire Floor Layout

Occasionally, you may need to rotate the entire floor layout, usually due to a change in the location of the *OpenTable* system or the host stand. You can do this using the *More ...* button at the top of the page in the *Edit Floor Layout Dialog*.

To rotate the entire floor layout:

1. Load the floor layout that you want to edit (for more information, refer to "Editing a Floor Layout" on page 100).
2. Tap **More ...** on the *Top Navigation Bar*. The *More ... Dialog* is displayed.

3. Tap **Rotate Floor Layout Counter clockwise** to rotate the position of all tables ninety degrees counterclockwise. All the tables are shifted accordingly. You can also tap **Rotate Floor Layout Clockwise** to rotate the table positions in the other direction. Repeat as necessary.

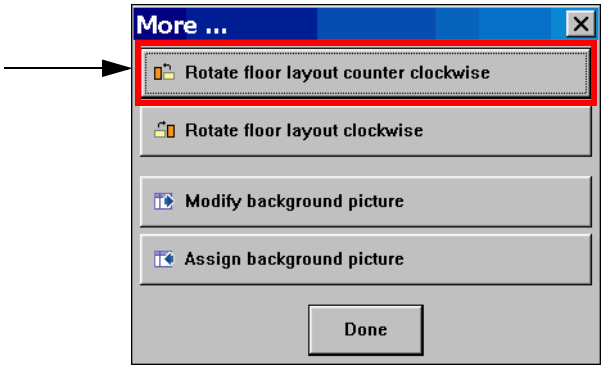


Figure 13-13: More ... Dialog

4. Tap **Done**. The *More ... Dialog* is closed.
5. Re-position any tables, if necessary.
6. Tap **Save** to save all your changes.

Importing a Background Picture

When creating or editing a floor layout, you can import a background picture to appear behind the tables on the floor layout. Background pictures typically show partitions, walls, and other objects on the floor for reference. Background pictures must be saved as a bitmap (.BMP) with the following dimensions: width = 465 pixels; height = 427 pixels.

To import a background picture:

1. Load the floor layout that you want to edit. (For more information, refer to "Editing a Floor Layout" on page 100.)
2. Tap **More ...** at the top of the page. The *More ... Dialog* is displayed.
3. Tap **Assign background picture**. The *Assign Background Dialog* is displayed with all available background pictures that were previously imported into the system.

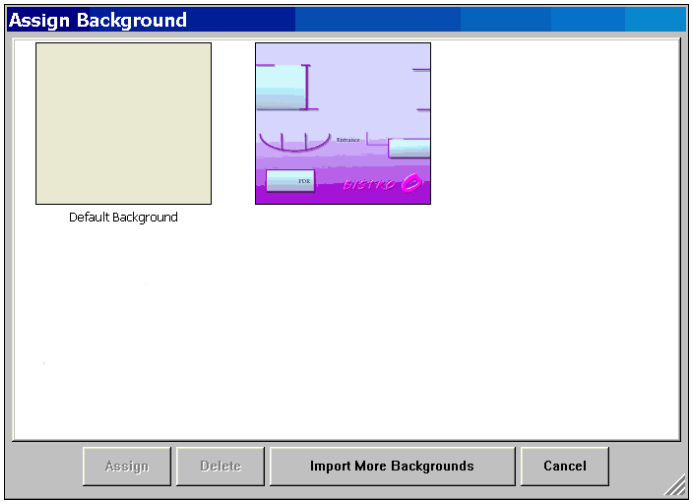


Figure 13-14: Assign Background Dialog

4. Tap **Import More Backgrounds**. The *Import Background Dialog* is displayed.
5. Navigate to the location of your background picture and select it. You can only import background pictures that are in bitmap format.

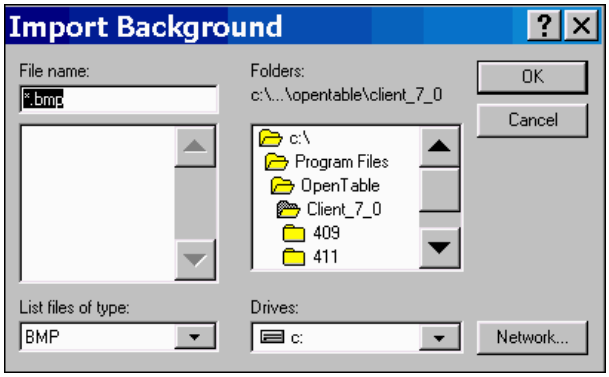


Figure 13-15: Import Background Dialog

6. Tap **OK**. The background picture is imported into the system and a thumbnail of the picture appears in the *Assign Background Dialog*.
7. Tap on the picture to select it and tap **Assign**. The background picture appears on the floor layout.
8. Tap **Done** to close the *More ... Dialog*.
9. Tap **Save** to save all your changes.

You can create background pictures using another graphics software package like Adobe Photoshop. Make sure you save the picture as a bitmap with the appropriate dimensions and copy it to a computer using the OpenTable software. Then, follow the steps to import the picture.

Modifying a Background Picture

To modify an existing background picture that is assigned to a floor layout:

1. Load the floor layout that you want to edit. (For more information, refer to "Editing a Floor Layout" on page 100.)
2. Tap **More ...** at the top of the page. The *More ... Dialog* is displayed.

3. Tap **Modify Background**. The system launches Microsoft Paint. Use Microsoft Paint to edit your background picture and add shapes, logos, colors, etc.

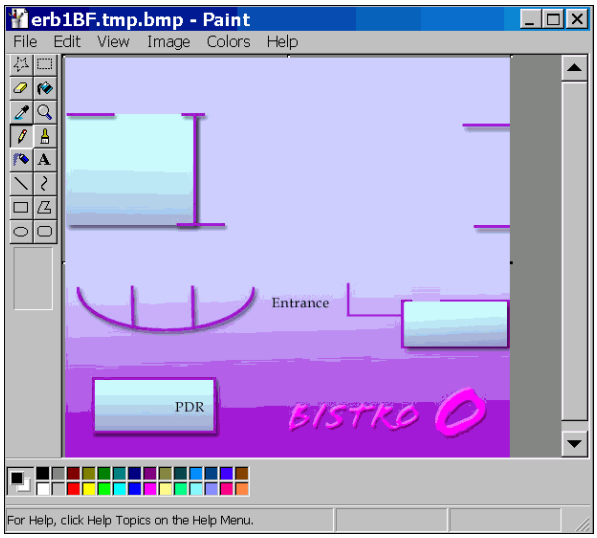


Figure 13-16: Editing a Background Picture in Microsoft Paint

4. Tap **File**, **Save** on the menu bar to save your changes.
5. Tap **File**, **Exit** on the menu bar to exit Microsoft Paint and return to the *OpenTable* system.
6. Tap **Done** to close the *More ... Dialog*.
7. Tap **Save** to save all your changes.

Assigning a Background Picture

To assign a background picture to the floor layout:

1. Load the floor layout that you want to edit. (For more information, refer to "Editing a Floor Layout" on page 100.)
2. Tap **More ...** at the top of the page. The *More ... Dialog* is displayed.
3. Tap **Assign Background**. The *Assign Background Dialog* is displayed with all available background pictures that were previously imported into the system.

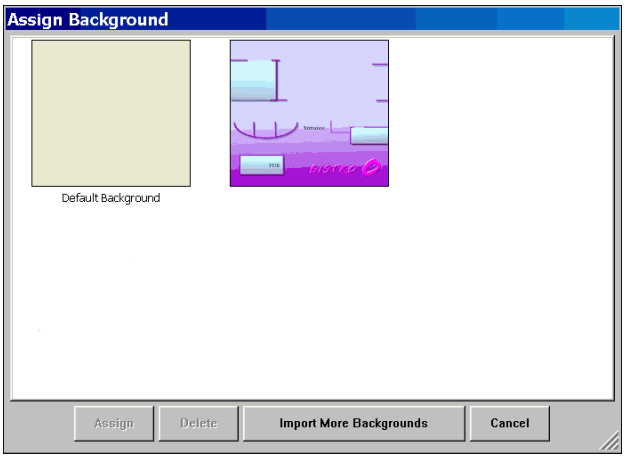


Figure 13-17: Assign Background Dialog

4. Tap a **picture** to select it and tap **Assign**. The background picture appears on the floor layout.
5. Tap **Done** to close the *More ... Dialog*.
6. Tap **Save** to save all your changes.

Size Requirements and Limits for Tables and Background Pictures

- The size of each table is configurable. The minimum height and width for each table is 15 pixels and the maximum height and width for each table is 150 pixels.
- All background pictures must be saved as a bitmap (.BMP) with the following dimensions: width = 465 pixels; height = 427 pixels.

Things You Should Know About Floor Layouts

- You cannot save a floor layout if you have overlapping tables on the layout. Overlapping tables are highlighted in red on the layout. To correct the problem, move the tables so that they do not overlap and then tap **Save** to save your changes.
- The system will warn you if you try to exit from the *Add or Edit Floor Layout Dialog* and you have tables with duplicate table numbers on the floor layout that you are editing.
- You can create as many floor layouts as you want in the system but you can only assign a maximum of four floor layouts to any one reservation sheet (or shift).
- You can assign floor layouts to a reservation sheet on the *Sheets Tab* on the *Sheets, Floor Layouts, Schedules Dialog.* (For more information, refer to "Assigning Floor Layouts to the Sheet" on page 88.) You can assign a reservation sheet to a shift on the *Schedules Tab* on the *Sheets, Floor Layouts, Schedules Dialog.* (For more information, refer to "Schedules Tab" on page 114.)

Chapter 14: Schedules

It is critical that the *OpenTable* system accurately reflects when the restaurant is open or closed because of reservations being made by web users. With a paper reservation book, restaurants controlled their schedule by instructing restaurant reservationists and the host staff not to take reservations for closed days or shifts. Of course, you can still do that today. The difference is that the *OpenTable* system is also designed to accept reservations from web users. Web users will not know if you are closed for a specific holiday or special event unless you reflect this in the *OpenTable* system. The Schedules chapter shows you how to open and close shifts and entire days in the *OpenTable* system.

Types of Schedules

There are three kinds of schedules in the *OpenTable* system:

- *Default or REGULAR Schedules*
- *Date Ranges*
- *Alternate Schedules*

Default or Regular Schedules

Default Schedules are the restaurant's regular schedule for each of the seven days of the week (Sunday - Saturday). You create your *Default Schedule* by assigning reservation sheets to the open shifts for each day of the week. Once configured, the *Default Schedules* will be in place throughout the year. If you create *Date Ranges* and *Alternate Schedules*, they will temporarily replace the *Default Schedule* on those days. Once the date range or *Alternate Schedule* passes, the schedule will return to the *Default or REGULAR Schedule.*

Date Ranges

Date Ranges allow you to create a repeating schedule over several days that temporarily replace your *Default or REGULAR Schedule.* You might create a date range if the restaurant was closed for an extended period or if you wanted to create a seasonal schedule. When the range passes, your schedules will return to your *Default or REGULAR Schedule.*

Alternate Schedules

Alternate Schedules are single days that have a schedule that differs from your *Default or REGULAR Schedule.* You might create an *Alternate Schedule* for holidays and special events (for example, New Year's Eve or Valentine's Day) where the schedule differs from the regular schedule. When the *Alternate Schedule* passes, your schedule will return to your *Default or REGULAR Schedule.*

How to Change Schedules In the OpenTable System

There are two ways to change your schedules in the *OpenTable* system:

- *Schedules Tab* - In the *Admin View*, you can tap *Sheets, Floor Layouts, and Schedules* to access the *Schedules Tab.* The *Schedules Tab* provides several different views that you can use to see and change your schedules. Use this method if you want to see a global view of all the schedules on a calendar or if you want to work with list views of the three different schedule types.
- *Scheduling Wizards* - You can access the wizards from several parts of the system, including the *Sheet, Book, and Floor Views* and the aforementioned *Schedules Tab*. This method is faster and requires less knowledge of how schedules work in the *OpenTable* system.

Schedules Tab

Schedules Tab - Calendar View

When you first navigate to the *Schedules Tab*, the *Calendar View* is displayed by default. This view shows the reservation sheets assigned to the different shifts for the selected day in the calendar. In addition to the *Calendar View,* there are several other views that you can access from the *Schedules Tab*, including the *Alternate Schedule, Ranges, and Defaults Views.*

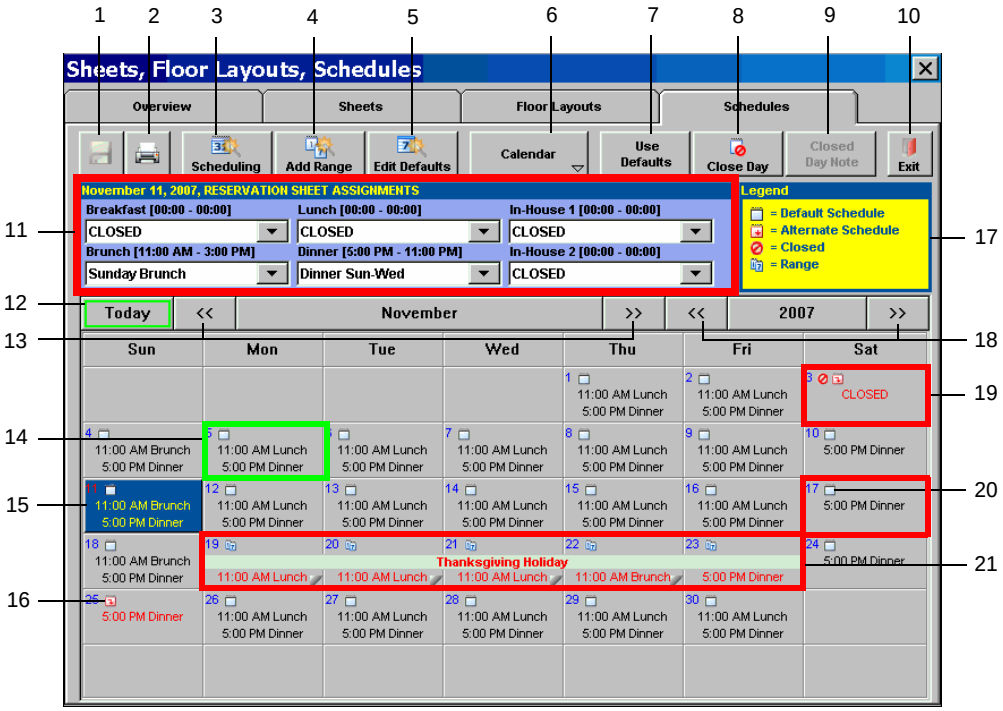


Figure 14-1: Schedules Tab / Calendar View

1	Save	Save your changes to the schedule	12	Today	Selects today's date
2	Print	Prints the calendar	13	Change Month	Moves to the previous / next month
3	Scheduling	Step-by-step wizard for performing basic scheduling tasks	14	Today's Date	Today's date is highlighted in the Calendar
4	Add Range	Step-by-step wizard for creating a schedule across a date range	15	Selected Date	The currently selected day
5	Edit Defaults	Step-by-step wizard for editing your Default or Regular Schedule	16	Alternate Schedule	Example of an Alternate Schedule
6	Change View	Change the View to Calendar, Alternate Schedule, Ranges or Defaults	17	Legend	Defines the icons that appear on the Calendar
7	Use Defaults	Use the Default Schedule for the selected day	18	Change Year	Moves to the previous / next year
8	Close Day	Close the selected day	19	Note	Example of a Closed Day Note
9	Closed Day Note	Enter a note for a closed day	20	Default Schedule	Example of a Default Schedule
10	Exit	Exit the Sheets, Floor Layouts, Schedules dialog	21	Date Range	Example of a date range
11	Reservation Sheet Assignments Panel	Displays current sheet assignments for the selected day			

Legend of Calendar Icons

Icons on the *Calendar View* identify the type of schedule that is active on that particular day.

Icon	Name	Description
	Default Schedule	This day is using one of the *Default or REGULAR Schedules*. Most days will display this icon.
	Alternate Schedule	This day's schedule is different from the *Default or REGULAR Schedule.*
	Closed (Day)	All shifts are closed for this day.
	Range	This day is part of a date range that has a schedule that is different from the *Default or REGULAR Schedule.*
	More ...	The calendar can only show some of the schedule information on the calendar. Tap this date to see more scheduling information in the Reservation Sheets Assignment Panel.

Table 14-1: Legend of Symbols When Adding and Changing Reservation Slots

Opening, Changing, and Closing Shifts on the Calendar View

1. Tap **Admin** on the *Side Navigation Bar.* Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Schedules Tab** to display the *Calendar View.*
4. Use the *Change Month* and *Change Year* controls to navigate to the day you want to work with and tap that date to select it. The *Reservation Sheet Assignments Panel* above the calendar changes to reflect the sheet assignments for the six shifts on that day.
   - Closed shifts have the "Closed" option selected in the dropdown list.
   - Open shifts display the name of the assigned reservation sheet in the dropdown list.
5. In the *Reservation Sheet Assignments Panel,* find the shift you want to open or close and tap the corresponding dropdown list for that shift. The list contains all the reservation sheets that were created for that shift type (Breakfast, Brunch, Lunch, Dinner, In-House 1 and In-House 2).
6. To open the shift, tap one of the reservation sheets in the list to assign the reservation sheet to the selected shift and date. To close the shift, tap **Closed**. Repeat as necessary for all shifts on that day.
7. Tap **Save** on the *Top Navigation Bar* to save your changes. The following things are displayed on the date in the calendar:
   - The *Alternate Schedule* icon appears, indicating that the date has a schedule that is different from the *Default Schedule.*
   - The start times and shift names of the open shifts appear.

You must save your scheduling changes for each date before moving on to another date.

Closing a Day on the Calendar View

1. Tap **Admin** on the *Side Navigation Bar.* Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Schedules Tab** to display the *Calendar View.*
4. Use the *Change Month* and *Change Year* controls to navigate to the day you want to work with and tap that date to select it. The *Reservation Sheet Assignments Panel* above the calendar changes to reflect the sheet assignments for the six shifts on that day.
   - Closed shifts have the "Closed" option selected in the dropdown list.
   - Open shifts display the name of the assigned reservation sheet in the dropdown list.
5. Tap **Close Day** on the *Top Navigation Bar.* All shifts in the *Reservation Sheet Assignments Panel* change to "Closed".
6. Tap **Closed Day Note** on the *Top Navigation Bar* if you want to enter a short note on why the day is closed.
7. Tap **Save** on the *Top Navigation Bar* to save your changes. The following things are displayed on the date in the calendar:
   - The *Alternate Schedule* icon appears, indicating that the date has a schedule that is different from the Default Schedule.
   - The *Closed* icon appears, indicating that the entire day is closed.
   - The *Closed Day Note* appears. If you did not enter a note, then "CLOSED" appears.

You cannot close current or future shifts that have pending reservations. For more information, refer to "Closing Shifts That Have Reservations" *on page 135*.

Schedules Tab - Alternate Schedules

The *Alternate Schedule View* in the *Sheets, Floor Layouts, Schedules Dialog* shows all the Alternate Schedules in the system. Alternate Schedules are one time schedule changes on one day that override your *Default Schedule* or *Date Ranges.* The *Alternate Schedule View* is designed to provide an easy way to see and change all *Alternate Schedule* overrides.

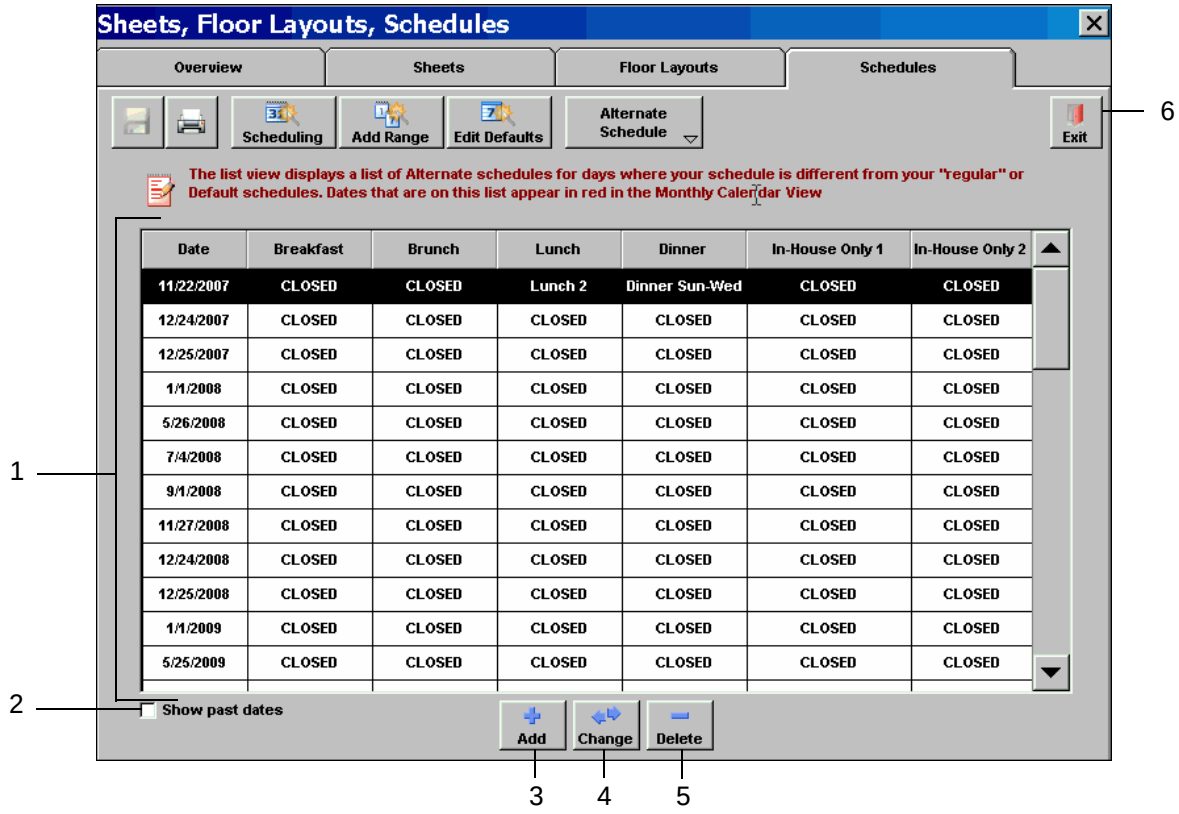

Sheets, Floor Layouts, Schedules
Overview
Sheets
Floor Layouts
Schedules
Scheduling
Add Range
Edit Defaults
Alternate Schedule
Exit
6
The list view displays a list of Alternate schedules for days where your schedule is different from your "regular" or Default schedules. Dates that are on this list appear in red in the Monthly Calendar View
Date
Breakfast
Brunch
Lunch
Dinner
In-House Only 1
In-House Only 2
11/22/2007 CLOSED CLOSED Lunch 2 Dinner Sun-Wed CLOSED CLOSED
12/24/2007 CLOSED CLOSED CLOSED CLOSED CLOSED CLOSED
12/25/2007 CLOSED CLOSED CLOSED CLOSED CLOSED CLOSED
1/1/2008 CLOSED CLOSED CLOSED CLOSED CLOSED CLOSED
5/26/2008 CLOSED CLOSED CLOSED CLOSED CLOSED CLOSED
7/4/2008 CLOSED CLOSED CLOSED CLOSED CLOSED CLOSED
9/1/2008 CLOSED CLOSED CLOSED CLOSED CLOSED CLOSED
11/27/2008 CLOSED CLOSED CLOSED CLOSED CLOSED CLOSED
12/24/2008 CLOSED CLOSED CLOSED CLOSED CLOSED CLOSED
12/25/2008 CLOSED CLOSED CLOSED CLOSED CLOSED CLOSED
1/1/2009 CLOSED CLOSED CLOSED CLOSED CLOSED CLOSED
5/25/2009 CLOSED CLOSED CLOSED CLOSED CLOSED CLOSED
1
2
Show past dates
Add
Change
Delete
3
4
5

Figure 14-2: Schedules Tab / Alternate Schedule View

1	Alternate Schedules	Displays a list of dates with Alternate Schedules	4	Change	Change the selected Alternate Schedule
2	Show Past Dates	Hide or show Alternate Schedules that have passed	5	Delete	Delete the selected Alternate Schedule
3	Add	Add a new Alternate Schedule	6	Exit	Exit and return to Admin View

Accessing the Alternate Schedule View

To access the *Alternate Schedule View:*

1. Tap **Admin** on the *Side Navigation Bar.* Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Schedules Tab** to display the *Calendar View.*
4. Tap **Calendar** on the *Top Navigation Bar* and tap **Alternate Schedules** in the list to select that view. The system displays the *Alternate Schedules View* with dates down the left side of the dialog and the

six shifts across the top of the dialog. All dates shown are dates with an *Alternate Schedule,* sorted by date in ascending order.

If the Show past dates checkbox at the bottom of the Alternate Schedule View is unchecked, all past dates are hidden (recommended). Check the box to see all Alternate Schedules in the system.

Creating or Adding an Alternate Schedule on the Alternate Schedules View

To create or add an *Alternate Schedule on the Alternate Schedule View:*

1. Load the *Alternate Schedule View.*
2. Tap **Add**. The system launches the *Open or Change Multiple Shifts Wizard.*
3. Follow the on-screen instructions in the *Scheduling Wizard.* For more information, refer to "Open or Change Multiple Shifts Wizard" on page 126. After completing the wizard, the *Alternate Schedule* icon appears on the date, indicating that it has a schedule that is different from the *Default Schedule.*

Changing Alternate Schedules on the Alternate Schedules View

To change an *Alternate Schedule on the Alternate Schedule View:*

1. Load the *Alternate Schedule View.*
2. Tap the **Alternate Schedule** you want to edit and tap **Change**. The system launches the *Open or Change Multiple Shifts Wizard,* loads the current *Alternate Schedule* information for that date, and moves immediately to Step 2 of the wizard.
3. Follow the on-screen instructions in the *Scheduling Wizard.* For more information, refer to "Open or Change Multiple Shifts Wizard" on page 126.

The Breakfast, Brunch, Lunch, and Dinner shifts cannot overlap with each other, but the In-House Only 1 and 2 shifts are allowed to overlap with all shifts. Slots on the In-House only 1 and 2 shifts are not available for booking on the Web.

Deleting Alternate Schedules on the Alternate Schedule View

To delete an *Alternate Schedule on the Alternate Schedule View:*

1. Load the *Alternate Schedule View.*
2. Tap the **Alternate Schedule** you want to delete. You can also **Shift-Tap** to select a block of dates or **Ctrl-Tap** to multi-select specific dates.
3. Tap **Delete**. The system displays a confirmation dialog.
4. Tap **Yes** or **Yes to All** to delete the selected *Alternate Schedules.* The schedule for those dates will revert back to the underlying *Default Schedule.* The *Alternate Schedule* icon is removed and the *Default Schedule* icon appears, indicating that the date has a *Default Schedule.*

You cannot delete an Alternate Schedule if there are pending reservations on that date AND the Default Schedule that takes the place of the Alternate Schedule is "Closed".

Schedules Tab - Ranges View

The *Ranges View* in the *Sheets, Floor Layouts, Schedules Dialog* shows you all the *Date Ranges* you have scheduled. *Date Ranges* allow you to create a repeating schedule over several days that temporarily replace your *Default or REGULAR Schedule.* The *Ranges View* is designed to provide an easy way to see and change all existing *Date Ranges.*

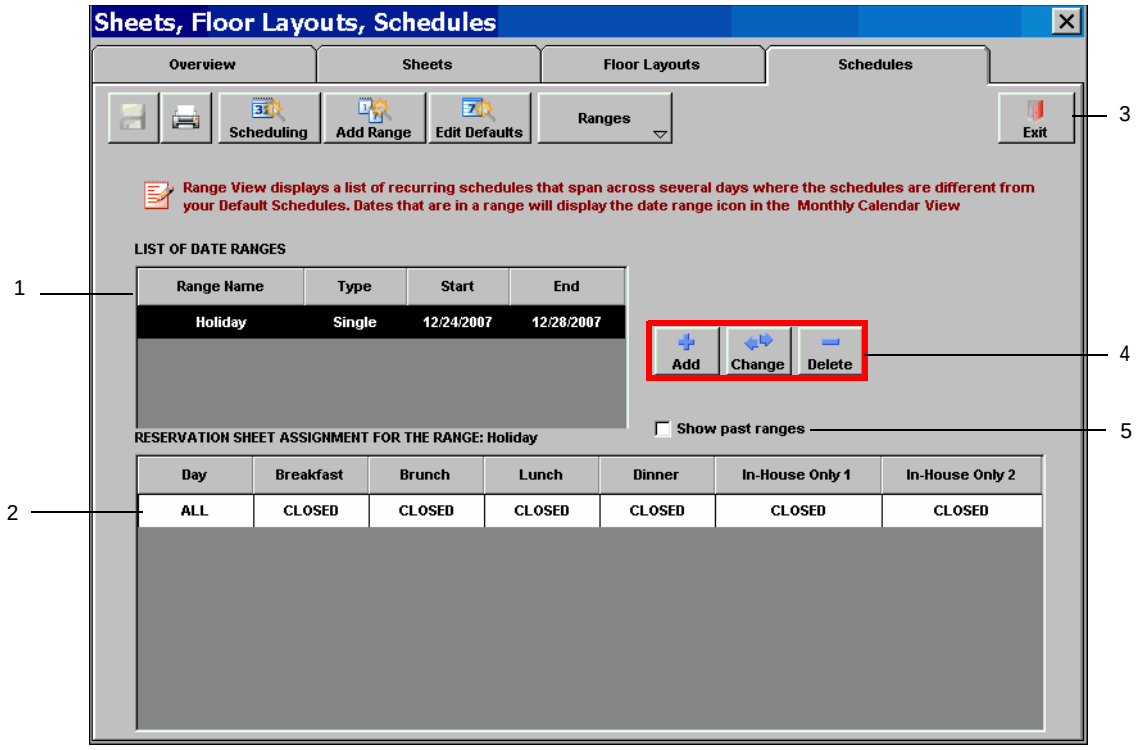


Figure 14-3: Schedules Tab / Ranges View

1	List of Date Ranges	List of date ranges	4	Edit Controls	Add, change or delete selected date range
2	Reservation Sheet Assignment	Reservation sheet assignments for the selected date range	5	Show Past Ranges	Hide or show date ranges that have passed
3	Exit	Exit Schedules Tab and return to Admin View			

Things You Should Know About Date Ranges

Scheduling *Date Ranges* is an advanced feature that is both powerful and complex. Some important facts to note about *Date Ranges* include:

- *Date Ranges* cannot overlap with each other.
- *Date Ranges* can span a minimum of two days and a maximum of six months.
- The *Date Range* schedule will override the underlying *Default Schedule.* For example, if you had a *Default Schedule* and a date range scheduled on the same day, the *Date Range* schedule is the one that will be in effect.
- An *Alternate Schedule* will override both the underlying *Default Schedule* and a date range. For example, if you had a *Default Schedule,* a date range, and an *Alternate Schedule* all scheduled on the same day, the *Alternate Schedule* is the one that will be in effect.

There are two different types of *Date Ranges:*

- *Single-Schedule Date Range* - this type of range repeats the same schedule over several days. For example if you wanted to close all shifts or have the same shifts opened / closed across several days, use this type of range. This type of range is typically used when you want to close the restaurant for an extended period of time.
- *Multi-Schedule Date Range* - this type of range repeats the same weekly pattern over several weeks. For example, if you wanted a different schedule for each of the seven days of the week and you wanted this schedule to be in place for several weeks, use this type of range. This type of range is typically used when you want to set up a seasonal schedule.

Accessing the Ranges View

To access the *Ranges View:*

1. Tap **Admin** on the *Side Navigation Bar.* Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Schedules Tab** to display the *Calendar View.*
4. Tap **Calendar** on the *Top Navigation Bar* and tap **Ranges** in the list to select that view. The system displays the *Ranges View,* which contains two grids. The grid at the top contains a list of all existing *Date Ranges,* sorted by start date in ascending order. The grid at the bottom contains the sheet assignments for all shifts for the selected date range.

If the Show past ranges checkbox below the Edit Controls on the Ranges View is unchecked, all past ranges are hidden (recommended). Check the box to see all Date Ranges in the system.

Creating or Adding Date Ranges on the Ranges View

To create or add a date range on the *Ranges View:*

1. Load the *Ranges View.*
2. Tap **Add**. The system displays Step 1 of the *Range Wizard.*
3. Follow the on-screen instructions in the *Range Wizard.* For more information, refer to "Schedule a Date Range Wizard" on page 126. After completing the wizard, the following things are displayed on the dates in the calendar:
   - The *Date Range* icon appears on all dates in the range, indicating that the date has a schedule that is different from the *Default Schedule.*
   - A banner with the range name appears across all dates in the range.

Changing Date Ranges on the Ranges View

To change a date range on the *Ranges View:*

1. Load the *Ranges View.*
2. Tap the range you want to edit in the top grid and tap **Change**. The system launches the *Range Wizard,* loads the range information, and moves immediately to Step 2 of the *Range Wizard.*
3. Follow the on-screen instructions in the *Range Wizard* to change the range. For more information, refer to "Schedule a Date Range Wizard" on page 126.

Deleting Date Ranges on the Ranges View

To delete a date range on the *Ranges View:*

1. Load the *Ranges View.*
2. Tap the range you want to delete in the top grid and tap **Delete**. The system displays a confirmation dialog.
3. Tap **Yes** to delete the date range. The schedule for those dates will revert back to the underlying *Default Schedules.*

- The *Date Range* icon is removed and the *Default Schedule* icon appears on all dates in the range, indicating that the date has a *Default Schedule.*
- The banner with the range name is removed.

You cannot delete a date range if there are pending reservations on any of those dates AND the Default Schedule that takes the place of the date range is "Closed".

Schedules Tab - Defaults View

The *Defaults View* in the *Sheets, Floor Layouts, Schedules Dialog* shows you all your *Default Schedules* for each of the seven days of the week (Sunday - Saturday). *Default Schedules* are the restaurant's regular schedule for each of the seven days of the week (Sunday - Saturday). You create your *Default Schedule* by assigning reservation sheets to the open shifts for each day of the week. Once configured, the *Default Schedules* will be in place throughout the year.

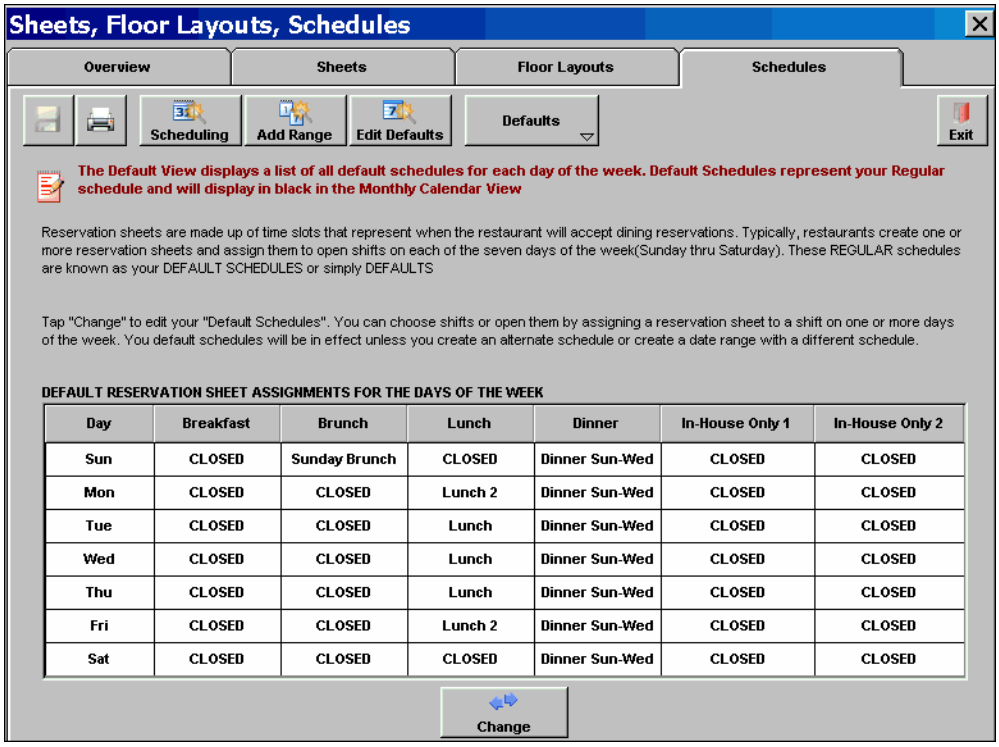

Sheets, Floor Layouts, Schedules
Overview
Sheets
Floor Layouts
Schedules
Scheduling
Add Range
Edit Defaults
Defaults
Exit
The Default View displays a list of all default schedules for each day of the week. Default Schedules represent your Regular schedule and will display in black in the Monthly Calendar View
Reservation sheets are made up of time slots that represent when the restaurant will accept dining reservations. Typically, restaurants create one or more reservation sheets and assign them to open shifts on each of the seven days of the week(Sunday thru Saturday). These REGULAR schedules are known as your DEFAULT SCHEDULES or simply DEFAULTS
Tap "Change" to edit your "Default Schedules". You can choose shifts or open them by assigning a reservation sheet to a shift on one or more days of the week. You default schedules will be in effect unless you create an alternate schedule or create a date range with a different schedule.
DEFAULT RESERVATION SHEET ASSIGNMENTS FOR THE DAYS OF THE WEEK
Day | Breakfast | Brunch | Lunch | Dinner | In-House Only 1 | In-House Only 2
Sun | CLOSED | Sunday Brunch | CLOSED | Dinner Sun-Wed | CLOSED | CLOSED
Mon | CLOSED | CLOSED | Lunch 2 | Dinner Sun-Wed | CLOSED | CLOSED
Tue | CLOSED | CLOSED | Lunch | Dinner Sun-Wed | CLOSED | CLOSED
Wed | CLOSED | CLOSED | Lunch | Dinner Sun-Wed | CLOSED | CLOSED
Thu | CLOSED | CLOSED | Lunch | Dinner Sun-Wed | CLOSED | CLOSED
Fri | CLOSED | CLOSED | Lunch 2 | Dinner Sun-Wed | CLOSED | CLOSED
Sat | CLOSED | CLOSED | CLOSED | Dinner Sun-Wed | CLOSED | CLOSED
Change

Figure 14-4: Schedule Tab / Defaults View

Changing the Default Schedule on the Defaults View

To change the *Default Schedule* on the *Defaults View:*

1. Tap **Admin** on the *Side Navigation Bar.* Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Schedules Tab** to display the *Calendar View.*
4. Tap **Calendar** on the *Top Navigation Bar* and tap **Defaults** in the list to select that view. The system displays the *Defaults View* with the current *Default Schedule* settings. The days of the week are displayed down the left side of the view and the six different shifts are displayed along the top of the view.
5. Tap **Change**. The system displays Step 1 of the *Default Schedules Wizard.*

6. Follow the on-screen instructions in the *Default Schedules Wizard.* For more information, refer to "Edit Default or Regular Schedules Wizard" on page 133.

The Breakfast, Brunch, Lunch, and Dinner shifts cannot overlap with each other, but the In-House Only 1 and 2 shifts are allowed to overlap with all shifts. Slots on the In-House Only 1 and 2 shifts are not available for booking on the Web.

Scheduling Wizards

Introduction to Wizards

OpenTable Scheduling Wizard

The *OpenTable Scheduling Wizards* provide easy to follow step-by-step instructions to help you perform common scheduling tasks. Scheduling wizards typically consist of 2 - 4 steps that guide you through the scheduling process. There are seven different scheduling wizards that you can use:

- Open or change a shift - open or change ONE shift on a SINGLE day.
- Open or change multiple shifts - open or change MULTIPLE shifts on a SINGLE day.
- Schedule a date range - change shifts across several days.
- Close a shift - close ONE shift on a SINGLE day.
- Close a day - close ALL shifts on a SINGLE day.
- Close a date range - close ALL shifts across several days.
- Edit *Default or REGULAR Schedules* - change the *Default or "REGULAR" Schedules.*

Basic Wizard Controls

All *Scheduling Wizards* have the same basic controls and layout. Use the *Back* and *Next* buttons to move back and forth between different steps of the wizard. The wizard will inform you if you did not enter any information that is required before allowing you to move on to the next step.

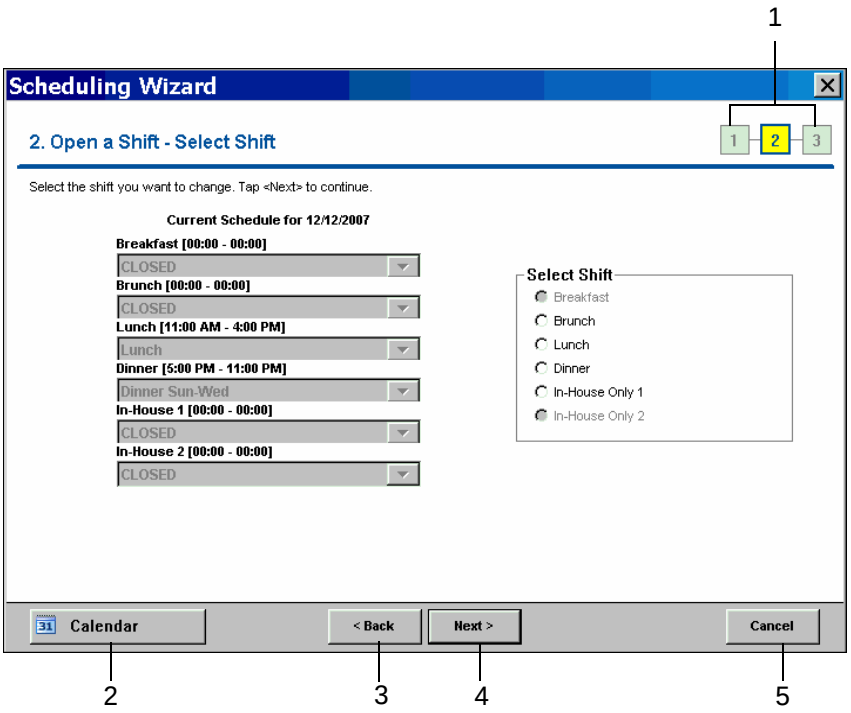


Figure 14-5: Scheduling Wizard Controls

1	Step	Shows what step you are on and how many steps there are in the wizard	4	Next	Move to the next step
2	Calendar	Navigates to the Calendar View on the Schedules Tab	5	Cancel	Cancel and exit this wizard
3	Back	Move back to the previous step	6	Finish (not shown)	Completes the wizard and saves your changes (replaces Next)

How to Access Scheduling Wizards

There are two main ways to access the *Scheduling Wizard.*

Accessing the Scheduling Wizard from the Sheet and Book Views

To access the *Scheduling Wizard* from the *Sheet and Book Views:*

1. Tap **Sheet** or **Book** on the *Side Navigation Bar.*
2. Tap **Options** on the *Top Navigation Bar.* If prompted, enter a password that has access to this area to continue. The *Options Dialog* is displayed.
3. Tap **Scheduling Wizard** in the *Options Dialog*. The **Scheduling Wizard** is displayed with seven options.

4. Tap the option you want to use and tap **Next**.

If at least one shift is open on a day, you can navigate to the Floor View on that day and access the Scheduling Wizard through the Options button in the lower right portion of the view.

Accessing the Scheduling Wizard from the Admin View

To access the *Scheduling Wizard* from the *Admin View:*

1. Tap **Admin** on the *Side Navigation Bar.* Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Schedules Tab** to display the *Calendar View.*
4. Tap **Scheduling** on the *Top Navigation Bar.* The **Scheduling Wizard** is displayed with seven options.
5. Tap the option you want to use and tap **Next**.

Open or Change a Shift Wizard

To open or change a shift using the *Scheduling Wizard:*

1. Launch the *Scheduling Wizard,* select the *Open or Change a Shift* option, and tap **Next**. Step 1 of the wizard displays a calendar with today's date selected by default.
2. Use the *Change Month* controls to navigate to the date you want to work with.

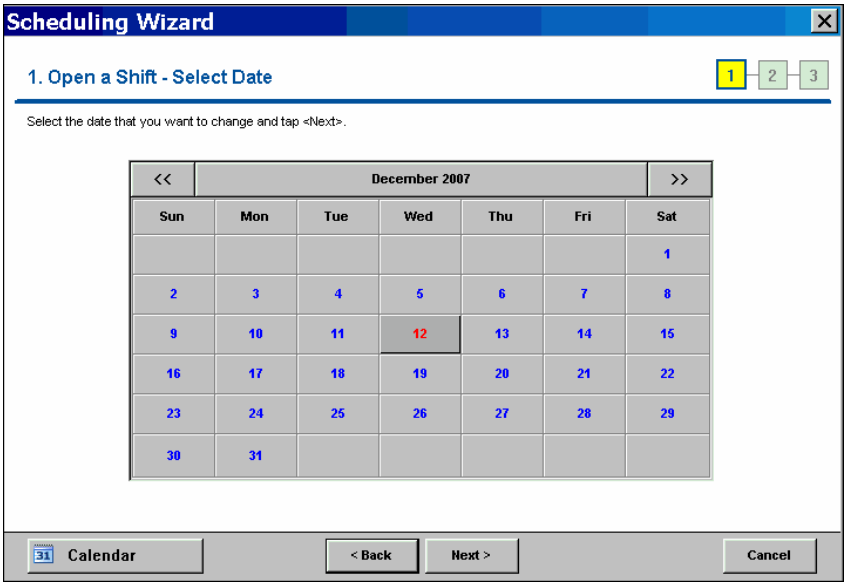


Figure 14-6: Open a Shift - Select Date

3. Tap the date to select it and tap **Next**. Step 2 of the wizard displays the current settings for the six shifts (Breakfast, Brunch, Lunch, Dinner, In-House 1 and In-House 2) on the left.

4. Use the radio buttons on the right to select the shift that you want to work with and tap **Next**. Step 3 of the wizard displays the current schedule settings on the left and one shift dropdown control on the right.

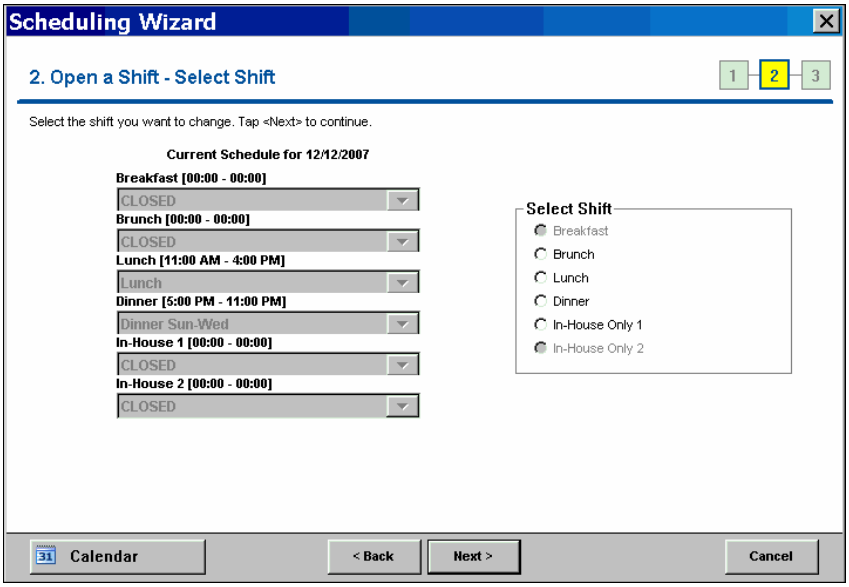


Figure 14-7: Open a Shift - Select Shift

5. Tap the dropdown control to see the list of available reservation sheets for that shift. To open the shift, tap one of the reservation sheets in the list to assign the reservation sheet to that shift. To close the shift, tap **Closed**. Repeat as necessary for all shifts.

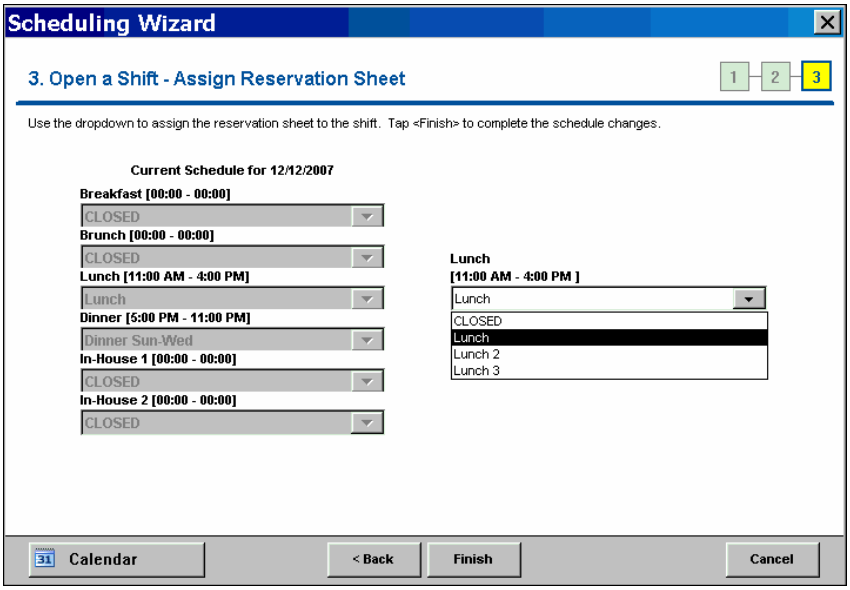


Figure 14-8: Open a Shift - Assign Reservation Sheet

6. Tap **Finish** to save your new schedule settings and return to the previous view.

Open or Change Multiple Shifts Wizard

To open or change multiple shifts on a single day using the *Scheduling Wizard:*

1. Launch the *Scheduling Wizard,* select the *Open or Change Multiple Shifts* option, and tap **Next**. Step 1 of the wizard displays a calendar with today's date selected by default.
2. Use the *Change Month* controls to navigate to the date you want to work with.
3. Tap the date to select it and tap **Next**. Step 2 of the wizard displays the current settings for the six shifts (Breakfast, Brunch, Lunch, Dinner, In-House 1 and In-House 2) on the selected day.
4. Use the shift dropdowns on the right to select the shift you want to work with. Only shifts that have reservation sheets created are available for selection.

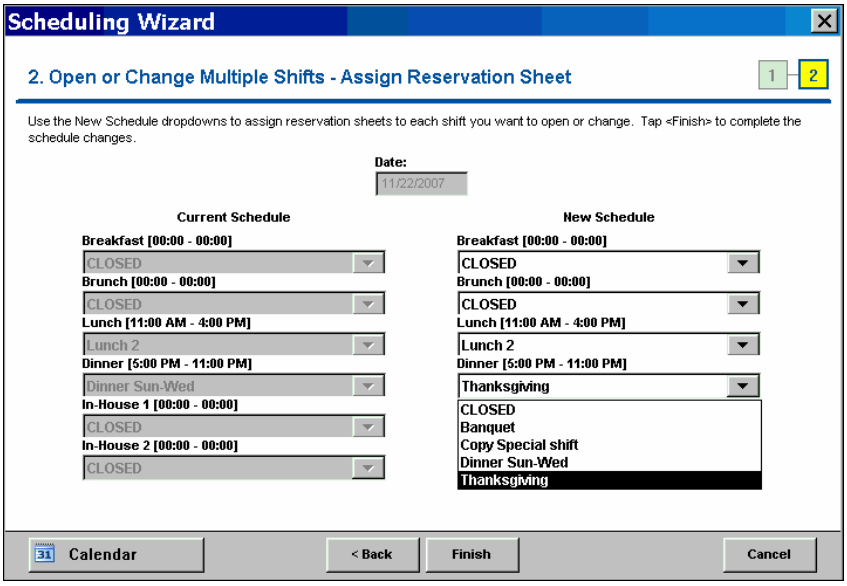


Figure 14-9: Open or Change Multiple Shifts - Assign Reservation Sheet

5. Tap one of the dropdown controls to see the list of available reservation sheets for that shift. To open the shift, tap one of the reservation sheets in the list to assign the reservation sheet to that shift. To close the shift, tap **Closed**. Repeat as necessary for all shifts on that day.
6. Tap **Finish** to save your new schedule settings and return to the previous view.

Schedule a Date Range Wizard

To schedule a date range using the *Scheduling Wizard:*

1. Launch the *Scheduling Wizard,* select the *Schedule a Date Range* option, and tap **Next**. Step 1 of the wizard displays an overview of basic date range concepts.
2. Tap **Next**. Step 2 of the wizard displays two calendars to select a start and end date for the date range. Today's date is selected by default for the start date and tomorrow's date is selected by default for the end date.

3. Enter a short name for the *Range Name* (this is a required field). The *Range Name* will be displayed on the S*cheduling Calendar View* on a banner spanning the date range.

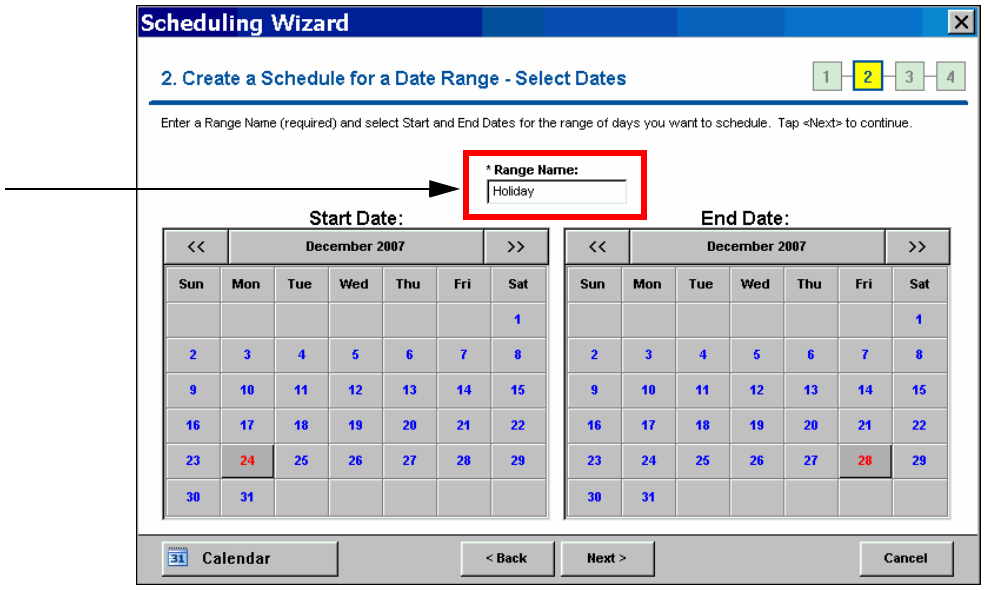


Figure 14-10: Create a Schedule for a Date Range - Select Dates and Enter Date Range Name

4. Use the *Change Month* controls on the *Start Date Calendar* to navigate to the date you want for the start of the date range. Tap the date to select it.
5. Use the *Change Month* controls on the *End Date Calendar* to navigate to the date you want for the end of the date range. Tap the date to select it. The End Date must be later than the Start Date.
6. Tap **Next**. On Step 3 of the wizard, you must select the type of date range you want to create. Select the date range type and tap Next.
   - *Single Day Schedule Date Range* - this type of range repeats the same schedule over several consecutive days.

- *Multi-Day Schedule Date Range* - this type of range repeats the same weekly pattern over several consecutive weeks.

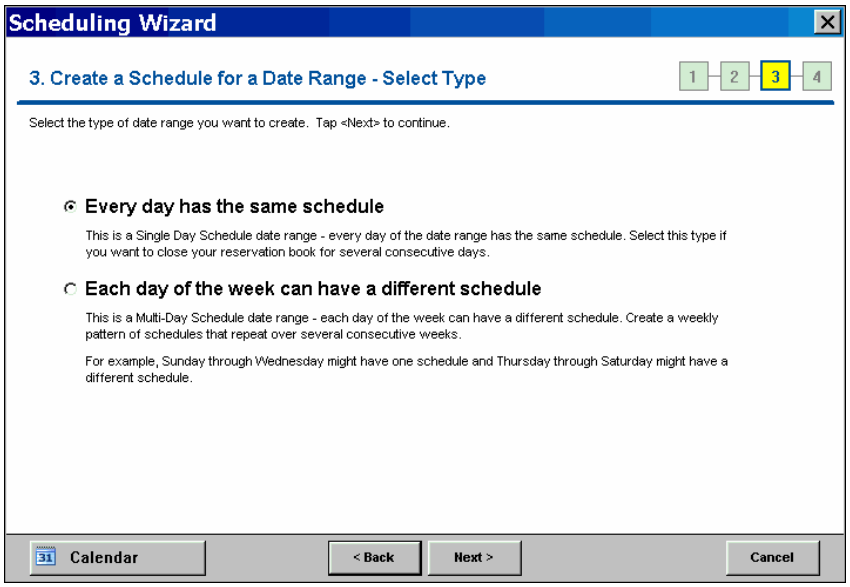

Scheduling Wizard
3. Create a Schedule for a Date Range - Select Type
1 2 3 4
Select the type of date range you want to create. Tap <Next> to continue.
Every day has the same schedule
This is a Single Day Schedule date range - every day of the date range has the same schedule. Select this type if you want to close your reservation book for several consecutive days.
Each day of the week can have a different schedule
This is a Multi-Day Schedule date range - each day of the week can have a different schedule. Create a weekly pattern of schedules that repeat over several consecutive weeks.
For example, Sunday through Wednesday might have one schedule and Thursday through Saturday might have a different schedule.
Calendar
< Back
Next >
Cancel

Figure 14-11: Create a Schedule for a Date Range - Select Type

7. If you selected a *Single-Day Schedule* (the first option), Step 4 of the wizard displays six shift dropdown controls (one for each shift). Tap one of the dropdown controls to see the list of available reservation sheets. To open the shift, tap one of the reservation sheets in the list to assign the reservation sheet to that shift. To close the shift, tap **Closed**. Repeat as necessary for all shifts. Every day in the date range will have the same schedule.

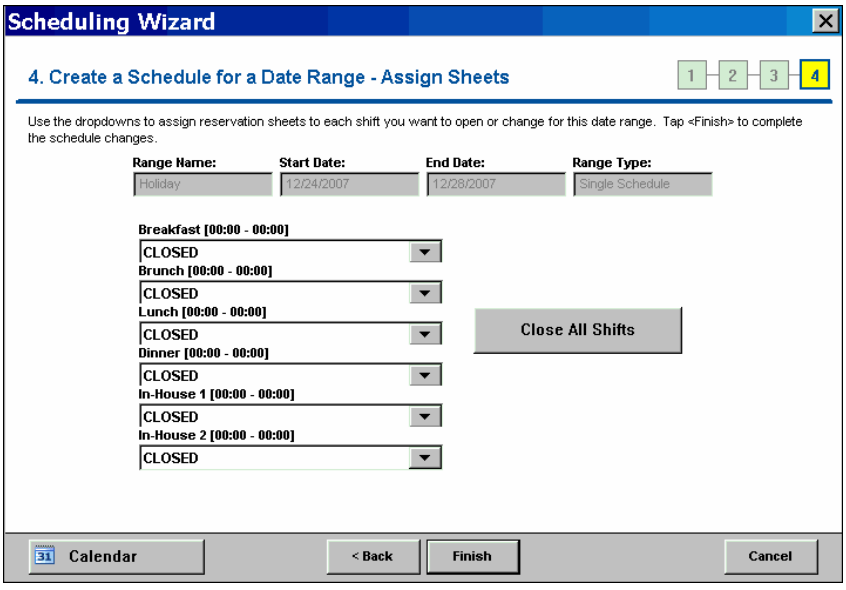


Figure 14-12: Create a Schedule for a Date Range - Assign Sheets (Single Day Schedule)

8. If you selected a *Multi-Day Schedule* (the second option), Step 4 of the wizard displays a grid with the shift settings for each day of the week. Find the day and shift you want to change. Tap the day of week and then tap the corresponding dropdown list for the shift you want to change. The list contains

all the reservation sheets that were created for that shift type (Breakfast, Brunch, Lunch, Dinner, In-House 1 and In-House 2). To open a shift, tap one of the reservation sheets in the list to assign the reservation sheet to that shift. To close the shift, tap **Closed**. Repeat as necessary for all shifts and days.

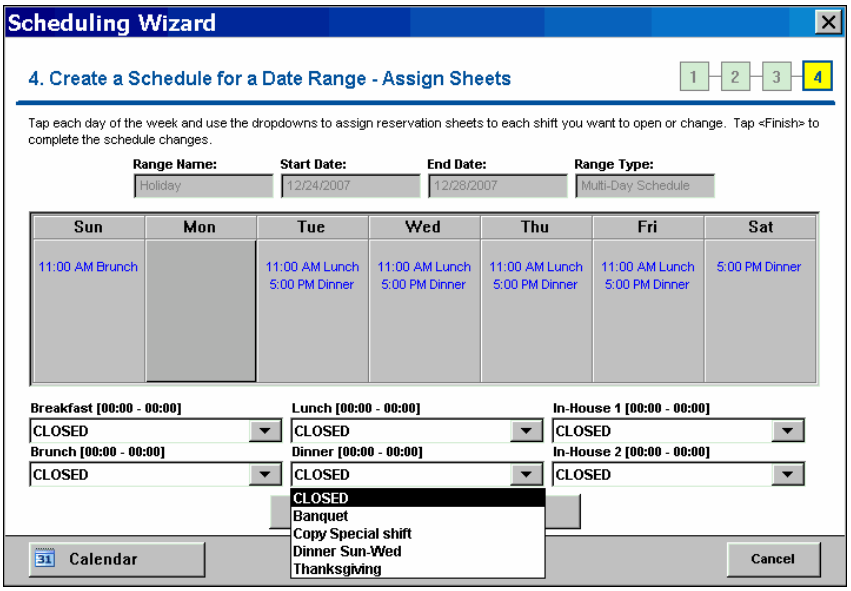


Figure 14-13: Create a Schedule for a Date Range - Assign Sheets (Multi-Day Schedule)

9. Tap **Finish** to save your new schedule settings and return to the previous view.

Close a Shift Wizard

To close a shift using the *Scheduling Wizard:*

1. Launch the *Scheduling Wizard,* select the *Close a Shift* option, and tap **Next**. Step 1 of the wizard displays a calendar with today's date selected by default.
2. Use the *Change Month* controls to navigate to the date you want to work with.
3. Tap the date to select it and tap **Next**. Step 2 of the wizard displays the current settings for the six shifts (Breakfast, Brunch, Lunch, Dinner, In-House 1 and In-House 2) on the left.

4. Use the radio buttons on the right to select the shift that you want to close.

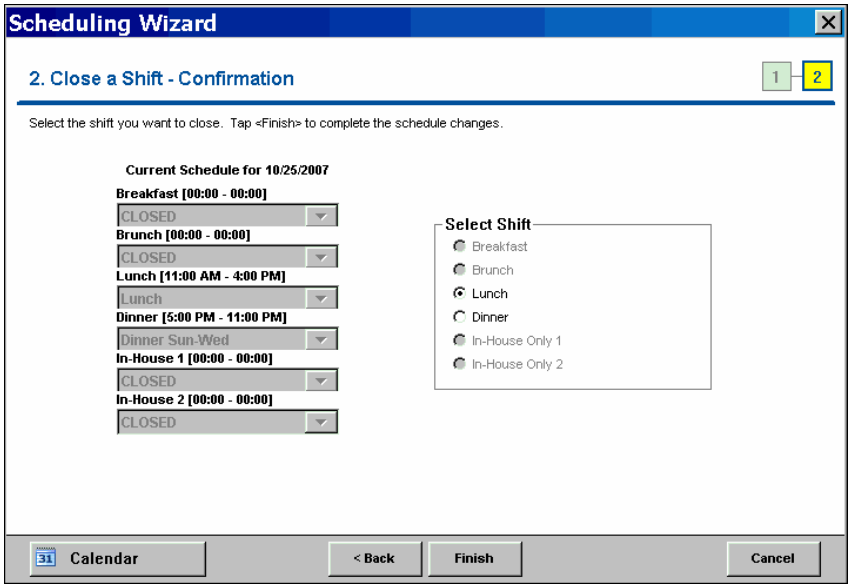


Figure 14-14: Close a Shift - Confirmation

5. Tap **Finish** to save your new schedule settings and return to the previous view.

You cannot close current or future shifts that have pending reservations. For more information, refer to "Closing Shifts That Have Reservations" *on page 135*.

Close a Day Wizard

To close a day using the *Scheduling Wizard:*

1. Launch the *Scheduling Wizard,* select the *Close a Day* option, and tap **Next**. Step 1 of the wizard displays a calendar with today's date selected by default.
2. Use the *Change Month* controls to navigate to the date you want to work with.
3. Tap the date to select it and tap **Next**. Step 2 of the wizard displays the original settings for the six shifts (Breakfast, Brunch, Lunch, Dinner, In-House 1 and In-House 2) on the left and the new settings on the right.

4. Tap **Finish** to save your new schedule settings and return to the previous view.

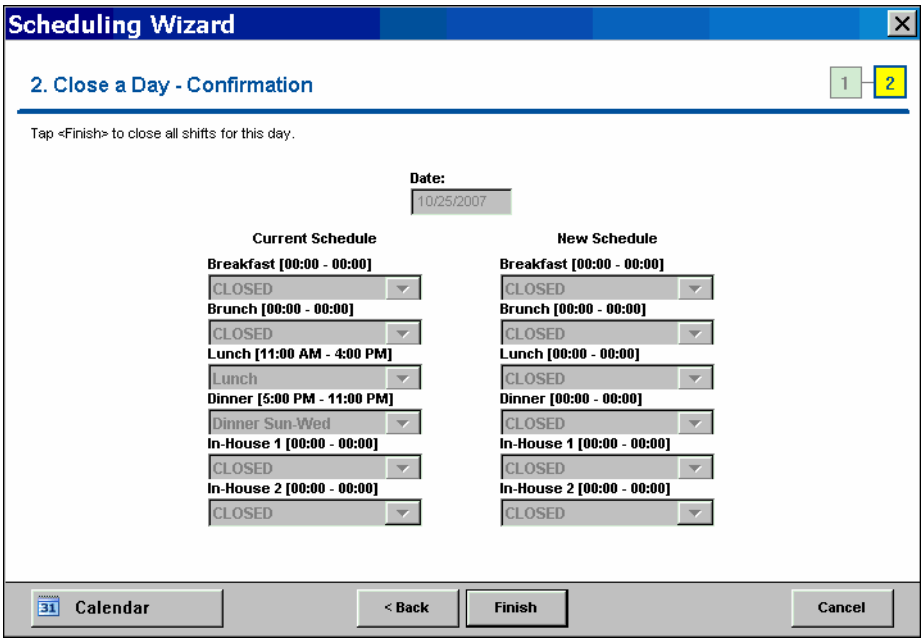


Figure 14-15: Close a Day - Confirmation

You cannot close current or future shifts that have pending reservations. For more information, refer to "Closing Shifts That Have Reservations" *on page 135*.

Close a Date Range Wizard

To close a date range using the *Scheduling Wizard:*

1. Launch the *Scheduling Wizard,* select the *Close a Date Range* option, and tap **Next**. Step 1 of the wizard displays an overview of basic date range concepts.

2. Tap **Next**. Step 2 of the wizard displays two calendars to select a start and end date for the date range. Today's date is selected by default for the start date and tomorrow's date is selected by default for the end date.

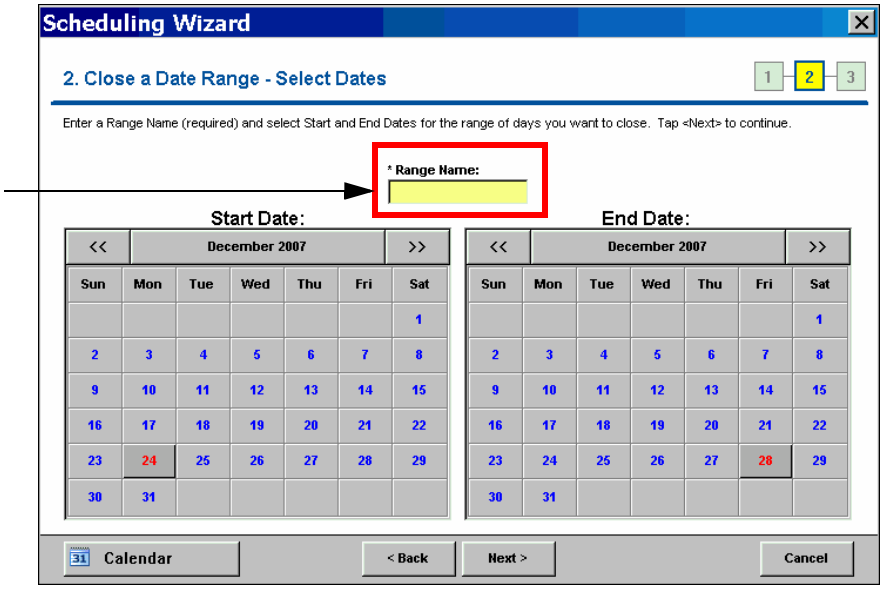


Figure 14-16: Close a Date Range - Select Dates

3. Enter a short name for the *Range Name* (this is a required field). The *Range Name* will be displayed on the *Scheduling Calendar View* on a banner spanning the date range.
4. Use the *Change Month* controls on the *Start Date Calendar* to navigate to the date you want for the start of the date range. Tap the date to select it.
5. Use the *Change Month* controls on the *End Date Calendar* to navigate to the date you want for the end of the date range. Tap the date to select it. The End Date must be later than the Start Date.
6. Tap **Next**. Step 3 of the wizard displays the new settings for the six shifts (Breakfast, Brunch, Lunch, Dinner, In-House 1 and In-House 2). All shifts show "Closed".

7. Tap **Finish** to save your new schedule settings and return to the previous view.

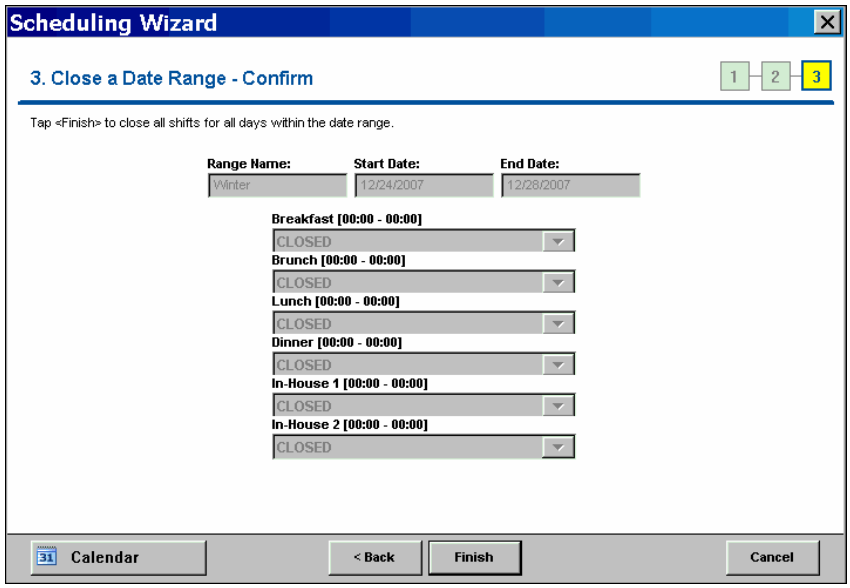


Figure 14-17: Close a Date Range - Confirm

Edit Default or Regular Schedules Wizard

To change your *Default Schedule* using the *Schedules Wizard:*

1. Launch the *Scheduling Wizard,* select the *Edit Default or REGULAR Schedules* option, and tap **Next**. Step 1 of the wizard displays an overview of basic reservation sheet and scheduling concepts.
2. Tap **Next**. Step 2 of the wizard displays the shift settings for each day of the week. Find the day and shift you want to change. Tap the day of week and then tap the corresponding dropdown list for the shift you want to change. The list contains all the reservation sheets that were created for that shift type (Breakfast, Brunch, Lunch, Dinner, In-House 1 and In-House 2).

3. To open the shift, tap one of the reservation sheets in the list to assign the reservation sheet to that shift for that day of the week. To close the shift, tap **Closed**. Repeat as necessary for all shifts and days.

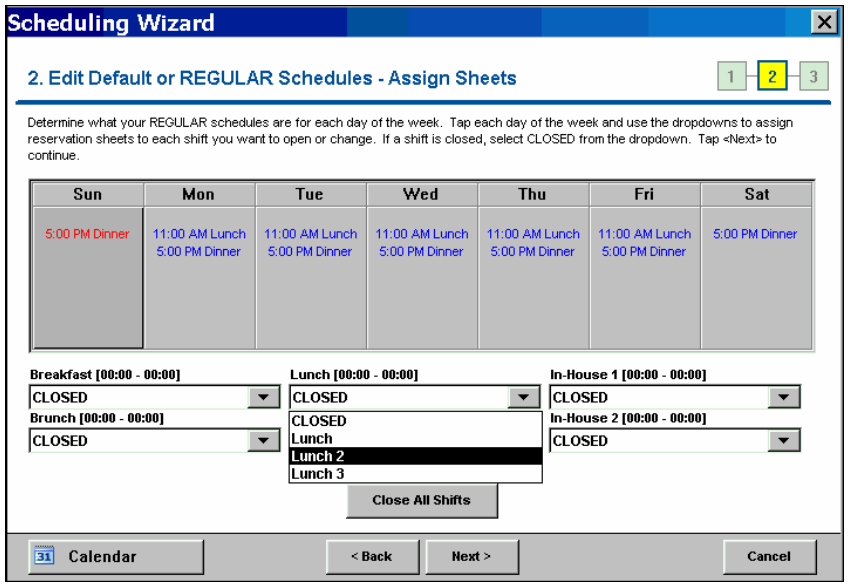

Scheduling Wizard
2. Edit Default or REGULAR Schedules - Assign Sheets
1 2 3
Determine what your REGULAR schedules are for each day of the week. Tap each day of the week and use the dropdowns to assign reservation sheets to each shift you want to open or change. If a shift is closed, select CLOSED from the dropdown. Tap <Next> to continue.
Sun Mon Tue Wed Thu Fri Sat
5:00 PM Dinner
11:00 AM Lunch 5:00 PM Dinner
Breakfast [00:00 - 00:00]
CLOSED
Brunch [00:00 - 00:00]
CLOSED
Lunch [00:00 - 00:00]
CLOSED
CLOSED
Lunch
Lunch 2
Lunch 3
In-House 1 [00:00 - 00:00]
CLOSED
In-House 2 [00:00 - 00:00]
CLOSED
Close All Shifts
Calendar
< Back
Next >
Cancel

Figure 14-18: Edit Default or Regular Schedules - Assign Sheets

4. Tap **Next**. In Step 3 of the wizard, the system displays the original *Default Schedule settings* and the new *Default Schedule settings.*
5. Tap **Finish** to save your *Default Schedule* changes and to return to the previous view.

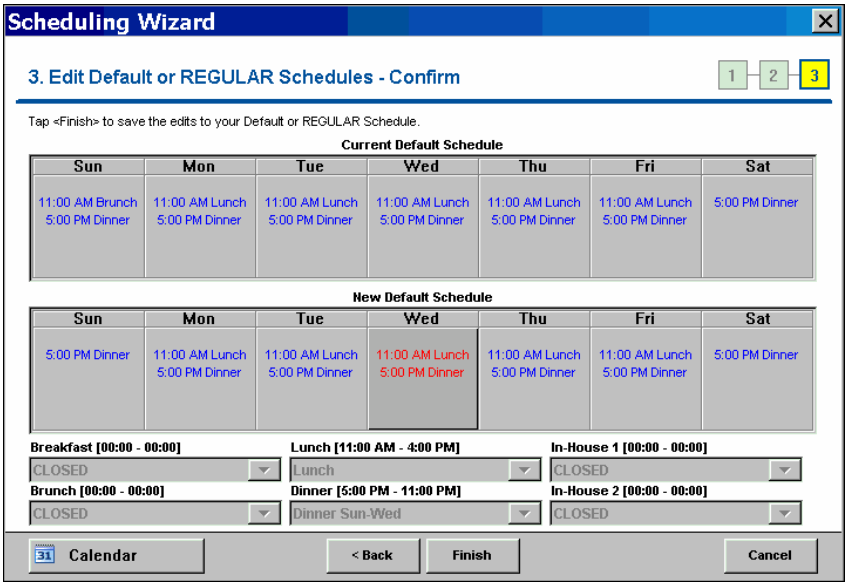


Figure 14-19: Edit Default or Regular Schedules - Confirm

Holidays

By default, the *OpenTable* system automatically closes all shifts on major holidays through the year 2013. The exact holidays will vary by country, and an *Alternate Schedule* is created for each closed day. This is to prevent the possibility of booking a reservation on a day where the restaurant is closed but the reservation book was mistakenly left open. To open the reservation book on one of these days / holidays, use the *Scheduling Tab / Calendar View* or the *Scheduling Wizard* to open the day and assign a reservation sheet to the shift you want to open.

Holiday	Date	US	All Other
New Year's Day	January 1	Closed	Closed
Memorial Day (US)	Last Monday in May	Closed	Open
Independence Day (US)	July 4	Closed	Open
Labor Day (US)	First Monday in September	Closed	Open
Thanksgiving (US)	Fourth Thursday in November	Closed	Open
Christmas Eve	December 24	Closed	Open
Christmas Day	December 25	Closed	Closed
Boxing Day	December 27	Open	Closed

Table 14-2: Auto-Closed Holidays

Closing Shifts That Have Reservations

Occasionally, you may have the need to close a current or future shift that already has reservations on it. Perhaps there was a last minute decision to close the shift because of a private event and you want to close the shift in the *OpenTable* system first before calling the guests to reschedule the reservations. Unfortunately, the *OpenTable* system will not allow you to do this because of the existing reservations. The fastest way to remove all the remaining empty slots from a shift (which effectively closes the shift to any new reservations) is to do the following:

- Create an empty reservation sheet.
- Assign the empty reservation sheet to the shift you want to close.

Creating an Empty Reservation Sheet

To create an empty reservation sheet:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap **Sheets, Floor Layouts, Schedules**.
2. If prompted, enter a password that has access to this area to continue.
3. Tap **Yes** to backup your reservation book. Then tap the **Sheets Tab**.
4. Tap **Add**. The *Add Sheet Dialog* is displayed and the *Properties Tab* is selected by default.
5. Enter a name for the new sheet (sheet names must be unique) and select the shift and type.
   - Name the sheet "Empty" or "Empty Dinner" or "Temp Close".

- When selecting the shift, make sure you select the same shift as the one you are trying to close.

6. Tap the **clock** icons to set the start time (First Slot) and end time (Last Slot).
   - Select the same start and end time as the shift you are trying to close.
7. Tap **Save** on the *Top Navigation Bar* to save your new sheet.

Assigning the Empty Reservation Sheet

To assign the empty reservation sheet:

1. After creating the empty reservation sheet, tap the **Schedules Tab** to display the *Calendar View.*
2. Use the *Change Month* and *Change Year* controls to navigate to the day you want to work with (the date that has the shift with the reservations that you want to close) and tap that date to select it. The *Reservation Sheet Assignments Panel* above the calendar changes to reflect the sheet assignments for the six shifts on that day.
3. In the *Reservation Sheet Assignments Panel,* find the shift you want to close and tap the corresponding dropdown list for that shift. Select the empty reservation sheet you just created. Do not select "Closed" in the dropdown list.
4. Tap **Save** on the *Top Navigation Bar* to save your changes. The following things are displayed on the date in the calendar:
   - The *Alternate Schedule* icon appears, indicating that the date has a schedule that is different from the *Default Schedule.*
   - The start times and shift names of the open shifts appear.

Rescheduling Existing Reservations

1. Navigate to the shift you "Closed" in the *Sheet or Book View.* All existing reservations are still visible and no empty slots are available for booking.
2. Call each guest that has a reservation on the shift and reschedule them for a different day.
3. When you move each reservation to the new day and time, the system displays a confirmation dialog asking if you want to delete the inserted reservation slot. This is the slot that the reservation was just moved from.
4. Tap **Yes** to remove the slot. This prevents leaving empty slots on the "Closed" shift.

Chapter 15: System and Floor Settings

System Settings

The second option in the *Main Options* section of the *Admin View* is *System Settings*. Tap the **System Settings** button to enter your restaurant's address and phone numbers and configure general restaurant and reservation settings. Enter your restaurant's contact information in the *Restaurant Information Tab*. In the *General Settings Tab*, configure settings such as the placement of your navigation bar or the default phone type. In the *Reservations Settings Tab,* enter reservation settings such as time limits to hold a new reservation slot or the sort order of your reservations.

Restaurant Information Tab

The *Restaurant Information Tab* allows you to enter basic restaurant information, including: restaurant name, address, phone and fax numbers. In the *Short Name* field, enter an 8 character short name for the restaurant, which is displayed in the *OpenTable* system's *Top Navigation Bar.*

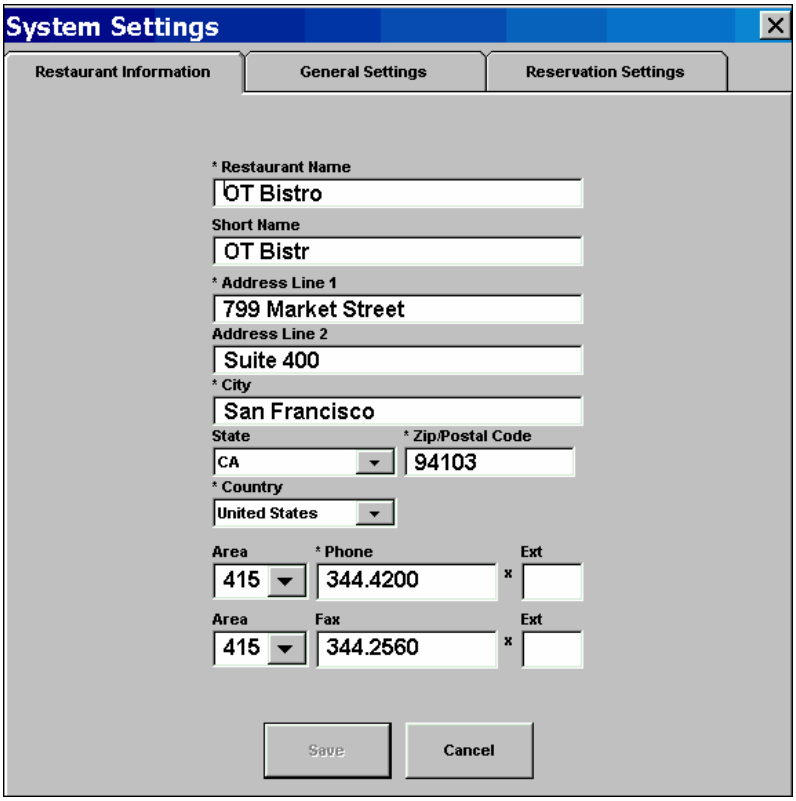


Figure 15-1: Admin View / System Settings / Restaurant Information Tab

General Settings

General Settings Tab

In the *General Settings Tab*, you can configure the following settings:

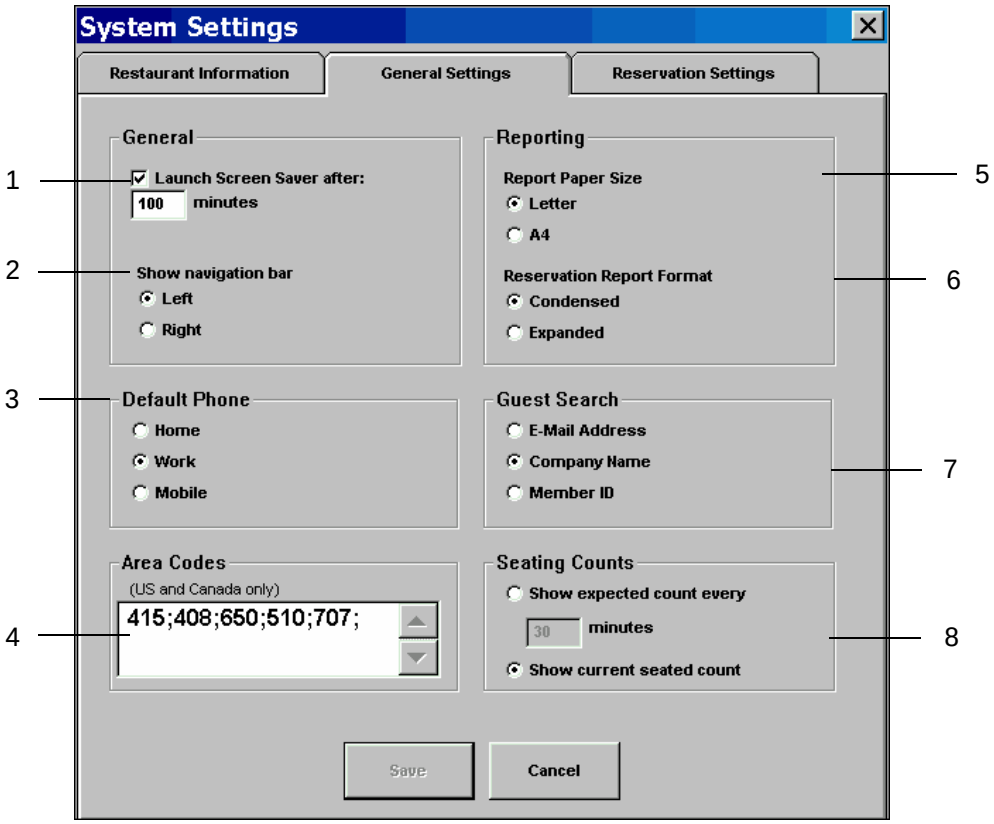


Figure 15-2: Admin View / System Settings / General Settings Tab

1	Screen Saver	Enable / Disable screen saver	5	Report Paper Size	Report paper size
2	Navigation Bar	Navigation Bar location	6	Reservation Report	Reservation report format
3	Default Phone Number	Default phone type to display	7	Guest Search	Default guest search format
4	Default Area Codes	Default area codes to display	8	Seating Counts	Seating counts settings

Screen Saver

The screen saver can be configured to launch after the *OpenTable* terminal is idle for a designated amount of time.

Activating the Screen Saver

To activate the screen saver:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.

2. Tap the **General Settings Tab**. In the *General* section, check the box next to *Launch Screen Saver after:* to activate the screen saver feature. Then enter the # of minutes in the *minutes* field. The minutes setting determines the amount of idle time before the screen saver is launched.

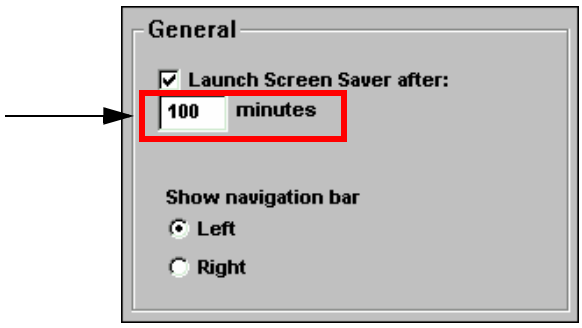


Figure 15-3: Configuring the # of Minutes of Idle Time Before Launching the Screen Saver

3. Tap **Save** to save your changes.

Disabling the Screen Saver

To disable the screen saver:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.
2. Tap the **General Settings Tab**. In the *General* section, uncheck the box next to *Launch Screen Saver after:* to deactivate the screen saver feature.

Figure 15-4: Disabling the Screen Saver

3. Tap **Save** to save your changes.

Navigation Bar

To configure the position of the navigation bar to display on the right or left side of the screen:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.

2. Tap the **General Settings Tab**. In the *General* section, tap the **Left** or **Right** radio button to set the location of the navigation bar.

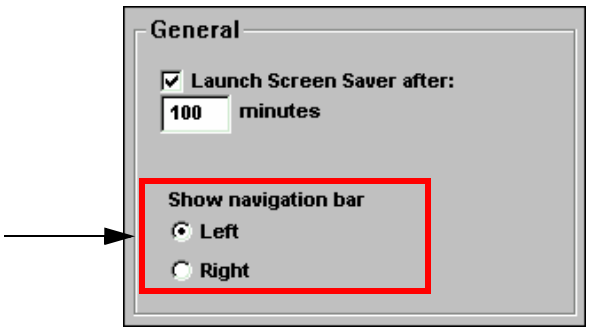


Figure 15-5: Configuring the Navigation Bar Location

3. Tap **Save** to save your changes.

Default Phone

The default phone type determines which phone number will be displayed automatically when you make a new reservation. To select the default phone type:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.
2. Tap the **General Settings Tab**. In the *Default Phone* section, tap the **Home, Work,** or **Mobile** radio button to set your default.

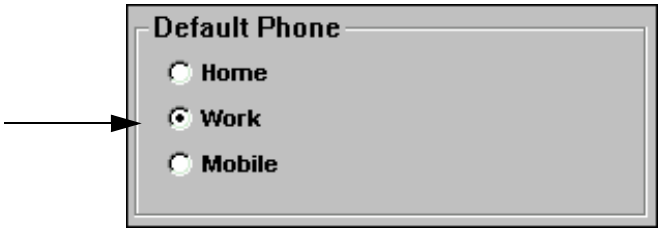


Figure 15-6: Configuring the Default Phone Type

3. Tap **Save** to save your changes.

Area Codes

The *Area Codes* field allows you to enter area codes that will display in the area code dropdown list when making a reservation or adding a guest to the system. Area codes are supported for the US and Canada only. To enter your default area codes:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.

2. Tap the **General Settings Tab**. In the *Area Codes* section, tap the *Area Codes* field and enter the area codes to be displayed.

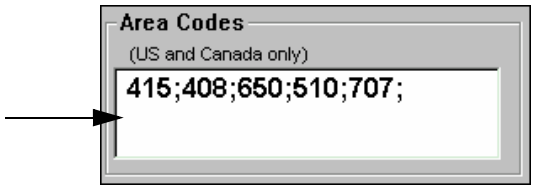


Figure 15-7: Configuring Area Code Defaults (U.S. and Canada Only)

3. Tap **Save** to save your changes.

Report Paper Size

To configure the report paper size for all printed reports:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.
2. Tap the **General Settings Tab**. In the *Reporting* section, tap the **Letter** or **A4** radio button to set your report paper size default.

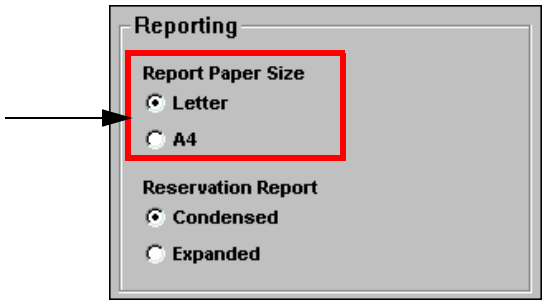


Figure 15-8: Configuring the Report Paper Size

3. Tap **Save** to save your changes.

Reservation Report Format

You can choose between two different formats for the reservation report: *Condensed* or *Expanded*. The condensed format prints the reservation report with less space between each reservation and has a line separator between groups of reservation time slots. The expanded format prints the reservation report with more space between reservations and has a line separator between each reservation. To configure the reservation report format:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.

2. Tap the **General Settings Tab**. In the *Reporting* section, tap the **Condensed** or **Expanded** radio button to set your reservation report format.

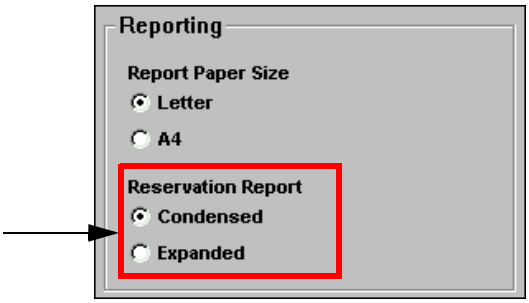


Figure 15-9: Configuring the Reservation Report Format

3. Tap **Save** to save your changes.

Guest Search

In addition to searching for guests by a combination of last name, first name, and telephone number, you can also search for guests by E-Mail Address, Company Name, or Member ID. You can configure which of these three options to display by default. To configure your guest search default:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.
2. Tap the **General Settings Tab**. In the *Guest Search* section, tap the **E-Mail Address, Company Name,** or **Member ID** radio button to set your guest search default.

Figure 15-10: Configuring the Guest Search Default

3. Tap **Save** to save your changes.
4. Tap the **Guest View** button on the *Side Navigation Bar.* You will see the additional search field default based on your selection.

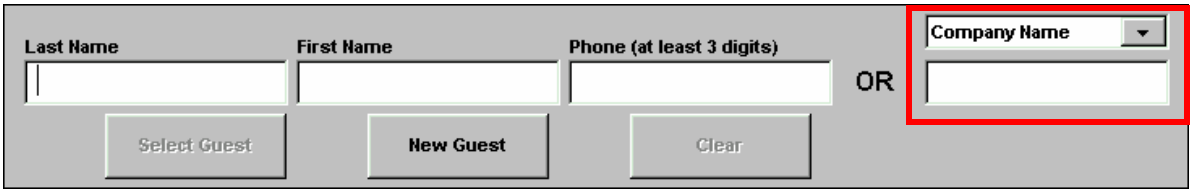


Figure 15-11: Search by Company Name

When searching for guests, you can search by:

- Any combination of last name, first name, and/or phone number, or
- E-Mail Address, or
- Company Name, or

- Member ID

You must enter a minimum of four characters in the Member ID field before the system begins searching. Member IDs can contain both numbers and letters. Searching by Member ID is useful for restaurants that use the OpenTable 3rd party APIs to manage and integrate a guest loyalty program with the OpenTable system. In such programs, every member is assigned a Member ID that can be imported into the OpenTable system.

Seating Counts

Configure the display of the *Cover Count* button on the *Top Navigation Bar* to display either the number of covers currently seated or the expected number of covers within the next several minutes. To configure the seating counts display:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.
2. Tap the **General Settings Tab** at the top. In the *Seating Counts* section, tap the **Show expected count every** (enter number of minutes) or **Show current seated count** radio button to set your seating counts default.

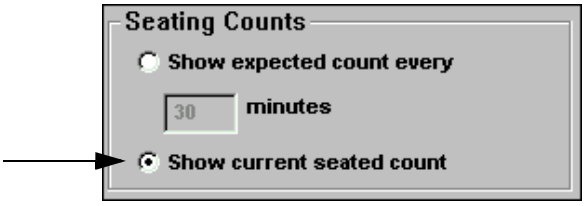


Figure 15-12: Configuring Seating Counts

3. If you choose the first option, *Show expected count every*, enter the number of minutes in the minutes field (typically 15 or 30 minutes).
4. Tap **Save** to save your changes.
5. The **Cover Count** button on the *Top Navigation Bar* will change depending on your preference.

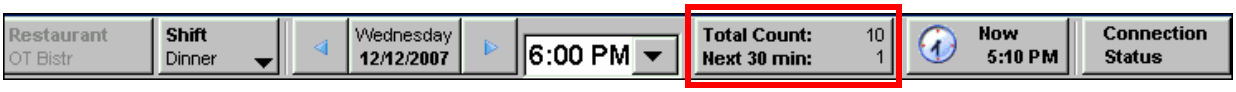


Figure 15-13: Cover Count Button on the Top Navigation Bar Set to Show Expected Counts Every 30 Minutes

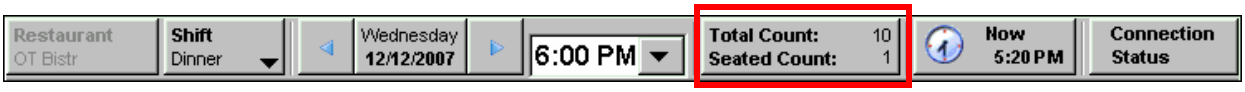


Figure 15-14: Cover Count Button on the Top Navigation Bar Set to Show Current Seated Counts

Reservation Settings

In the *Reservation Settings Tab* you can configure your reservation time limit, large party settings, new reservation settings and the reservation sort order.

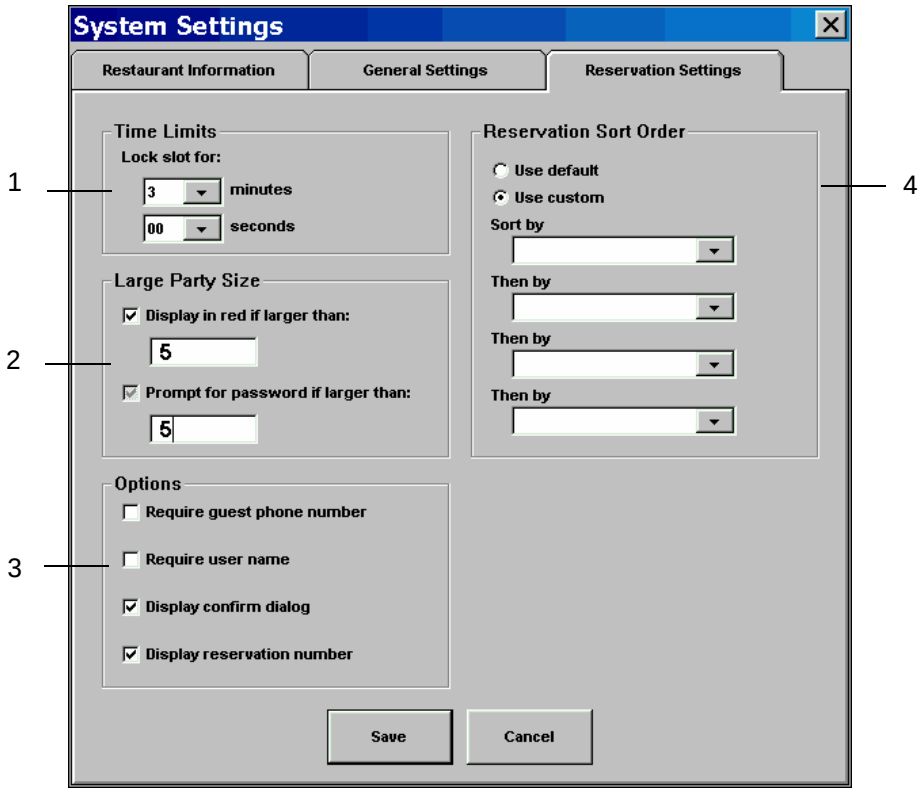


Figure 15-15: Admin View / System Settings / Reservation Settings Tab

1	Time Limits	Maximum time that a reservation slot can be locked	3	Options	Options for reservations
2	Large Party Size	Enter a number considered to be a large party	4	Reservation Sort Order	Set reservation sort order for all views

Reservation Time Limits

You can configure the system to temporarily lock a reservation slot for a minimum of two minutes or a maximum of nine minutes forty-five seconds after a user double-taps an empty reservation slot. During this time, the user has exclusive rights for a limited amount of time to complete the reservation. To set the reservation time limit:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.

2. Tap the **Reservation Settings Tab** at the top. In the *Time Limits* section, tap the dropdown list controls to select the # of minutes and seconds to lock a slot when making a new reservation.

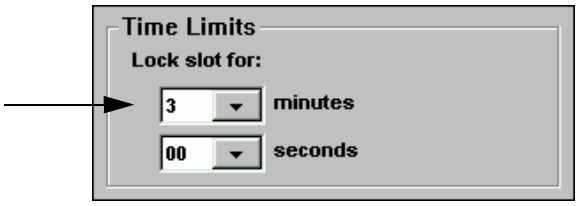


Figure 15-16: Configuring Time Limits

3. Tap **Save** to save your changes.
4. Tap the **Sheet View** button on the *Side Navigation Bar.*
5. Double tap an empty slot and select any guest to start making a reservation.
6. The system displays the *Make A Reservation Dialog*. The timer will display the remaining time for the temporary hold on the reservation.

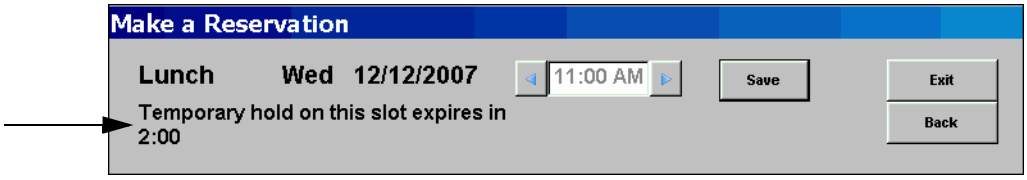


Figure 15-17: Reservation Lock Timer on the Make A Reservation Dialog

Large Party Settings

You can enter a number you consider to be a large party. When a party that is greater than this number is booked, the party will display in red text in all views. To set your large party settings:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.
2. Tap the **Reservation Settings Tab** at the top. In the *Large Party Size* section, check the box next to *Display in red if larger than:* to activate it, then enter a party size # in the field.

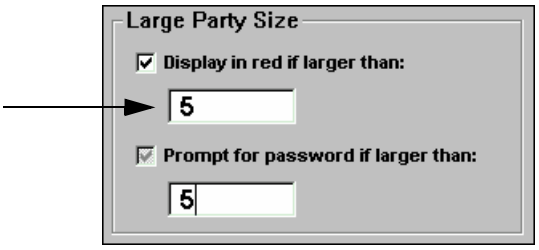


Figure 15-18: Configuring Large Party Display Settings

3. Tap **Save** to save your changes. All reservations with a party size larger than the value entered will be displayed in red.

Password Protect Large Party Reservations

You can also password protect the ability to make reservations for large parties. If the system is configured to do this, then the prompt for the password field is enabled for editing. For more information, refer to "Access Rights" on page 179. To enter a party size number to prompt for a password:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.

2. Tap the **Reservation Settings Tab** at the top. In the *Large Party Size* section, the *Prompt for a password if larger than:* checkbox is already checked (based on the settings in the *Access Rights* section). Enter a party size number in the field.

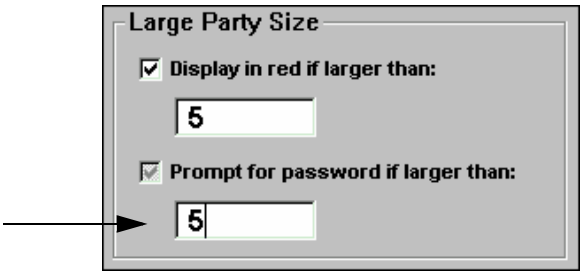


Figure 15-19: Configuring Large Party Settings to Prompt for a Password

3. Tap **Save** to save your changes. When a user makes a reservation with a party size larger than the value entered, the system will prompt for a password.

Reservation Options

In the *Options* section, you can configure the *OpenTable* system to require specific information whenever the reservationist makes a new reservation.

To set your new reservation settings:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.
2. Tap the **Reservation Settings Tab** at the top. In the *Options* section, check the boxes next to the fields that you want to activate.

Figure 15-20: Reservation Options

3. Tap **Save** to save your changes.

If the display confirmation E-Mail Dialog is selected, the system will display a confirm dialog after users make, change, or cancel any existing phone reservations.

Reservation Sort Order

Use the *Reservation Sort Order* section to set the sort order for your reservations in all views. You can use the default sort order or customize your sort order by Name, Phone, Size, Status, Table Number and Time. To set your reservation sort order:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **System Settings** button.

2. Tap the **Reservation Settings Tab** at the top. In the *Reservation Sort Order* section, select the radio button *Use default sort order* or *Use custom sort order* to set your sort order.

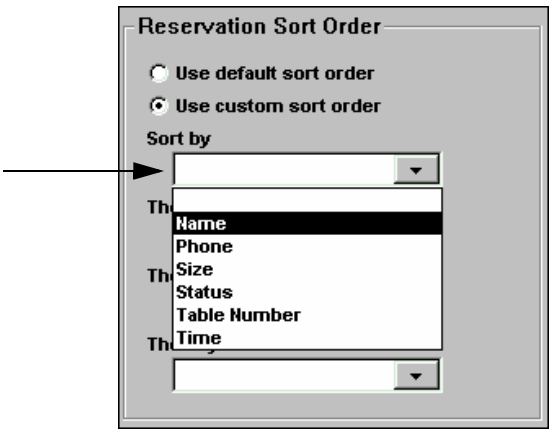


Figure 15-21: Reservation Sort Order

3. When you select *Use custom sort order*, tap the dropdown list and select the fields you want to sort by.
4. Tap **Save** to save your changes. Check the *Sheet, Book, and Floor Views* to make sure the sort order is what you expect it to be.

On the Sheet, Book, and Floor Views, you can still temporarily change the sort order by tapping the column headings on the view.

Floor Management Settings

In the *Floor Settings Tab* you can configure several different floor settings, such as floor timer displays and server sections. In the *Waitlist Settings Tab*, configure how guests are entered in the *Waitlist*, and in the *Chits / Cards Tab*, configure the type of guest information you want to print on *Chits and Guest Cards*.

Floor Settings Tab

Floor Settings Tab

The *Floor Settings Tab* allows you to configure the *Floor Timer Warning Display*, the direction of the *Floor Timer* and the *Color Settings* for the *Warning Display*. You can also configure the *Status Changes*, the dis-

play of the *Floor View Notes and Codes*, the display of *Server Sections* and how incoming parties are prioritized.

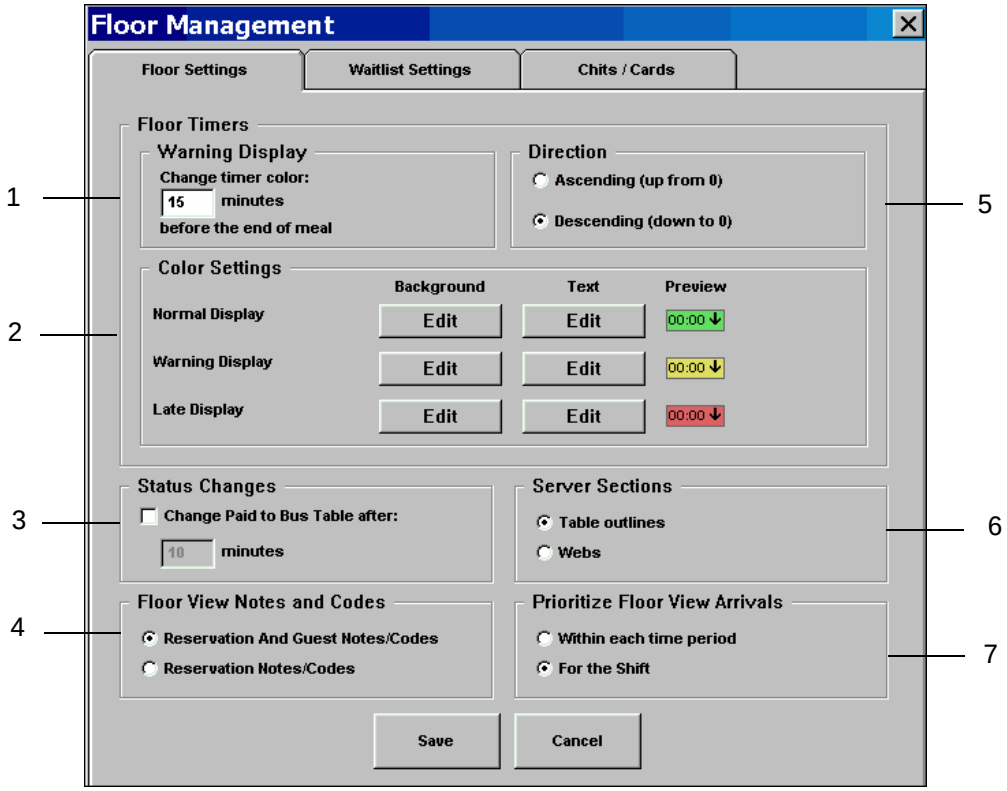


Figure 15-22: Admin View / Floor Management Settings / Floor Settings Tab

1	Warning Display	Enter minutes to change Floor Timer Display color scheme	5	Direction	Choose direction of Floor Timer (ascending or descending)
2	Color Settings	Customize color schemes for Floor Timer display	6	Server Sections	Display table outlines or webs for the server section
3	Status Changes	Option to automatically change status from paid to bus table	7	Prioritize Floor View Arrivals	Display arrivals within each time period or for the entire shift
4	Floor View Notes and Codes	Show or hide guest notes / codes on the Floor View			

Floor Timers

Floor timers are displayed on the *Floor View* (in hours and minutes) for all parties seated at a table. The timers can be set to “ascending” to track how long the party has been seated. Timers can also be set to “descending” to count down from the expected turn time (how long you expect a party to dine) down to

zero. Turn times can be set for each reservation sheet by party size. For more information, refer to "Setting Turn Times for the Sheet" on page 87.

You can configure the minutes setting to change the color scheme of the *Floor Timers* when a guest nears their expected departure time. The number in the *minutes* field determines when the timer will change to the *Warning Display Color*.

Figure 15-23: Setting the Floor Timer Warning Display

Color Settings for Warning Displays

You can customize the color schemes and text color for *Normal, Warning* and *Late Displays*. The *Preview* column shows the color settings for each display.

- *Normal Display* - Guest is seated and dining.
- *Warning Display* - Guest is expected to leave soon (based on the minutes setting and the expected turn time).
- *Late Display* - Guest has stayed past the expected turn time.

To configure the floor timer display settings:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Floor Management Settings** button. The *Floor Settings Tab* is displayed by default.
2. In the *Color Settings* section, tap the **Edit** button for the display you want to change.

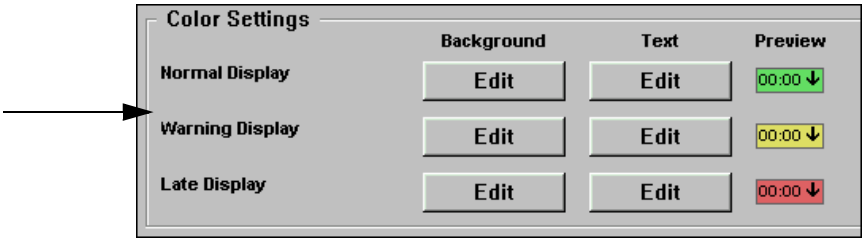


Figure 15-24: Customizing the Display Colors for Normal, Warning and Late Display

3. Select a color and tap **OK**.
4. Look at the color in the Preview column. Repeat as necessary.
5. Tap **Save** to save your changes.

Floor Timer Direction

You can set the direction of the *Floor Timers* to appear in ascending or descending order.

- Ascending counts up from zero and tracks how long a party has been seated.
- Descending counts down from the expected turn time.

To configure the direction of the warning display:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Floor Management Settings** button. The *Floor Settings Tab* is displayed by default.

2. In the *Direction* section, tap the **Ascending** or **Descending** radio button.

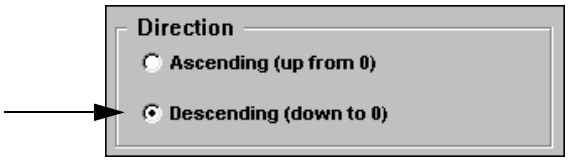


Figure 15-25: Configuring the Direction of the Warning Display

3. Tap **Save** to save your changes.

Status Changes

Configure the *OpenTable* system to automatically change the status of any entry that has a status of "Paid" to "Bus Table" after a designated amount of time. Enter the number of minutes in the *minutes field*. To enable the automated status change and set the time:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Floor Management Settings** button. The *Floor Settings Tab* is displayed by default.
2. In the *Status Changes* section, check the box next to *Change Paid Status to Bus Table after:*

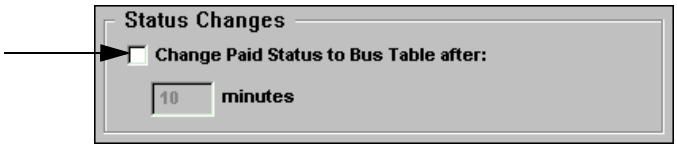


Figure 15-26: Configuring the Change Paid Status to Bus Table

3. In the *minutes* field, enter the number of minutes to wait before changing the status from "Paid" to "Bus Table."
4. Tap **Save** to save your changes.

Floor View Notes and Codes

In *Floor View*, you can choose to display both *Reservation and Guest Notes and Codes* or only *Reservation Notes and Codes*. To set the *Floor View* notes and codes display:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Floor Management Settings** button. The *Floor Settings Tab* is displayed by default.
2. In the *Floor View Notes and Codes* section, tap the **Reservation And Guest Notes/Codes** or **Reservation Notes/Codes** radio button.

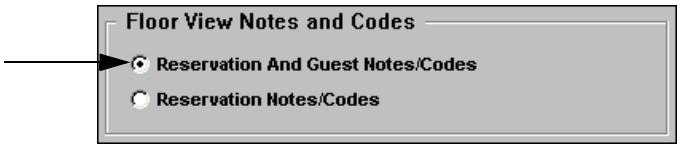


Figure 15-27: Configuring the Notes and Codes Display in Floor View

3. Tap **Save** to save your changes.

Server Sections

You can select two different ways to display server assignments on the *Floor View: Webs or Table Outlines*

If you select the *Webs* option, the system will draw lines from the table to the server's name, forming a web-like pattern. If you choose the *Table Outlines* option, the *Floor View* will vary depending on the table style. Server assignments for tables with chairs will be indicated by a colored outline around each table. Server assignments for tables without chairs will be indicated by the border color of the table.

In the following figure, 4 examples are displayed with the different server section options.

- The first example displays the server assignment using *Table Outlines* with chairs.
- The second example displays the server assignment using *Table Outlines* without chairs.
- The third example displays the server assignment using *Webs* with chairs.
- The fourth example displays the server assignment using *Webs* without chairs.

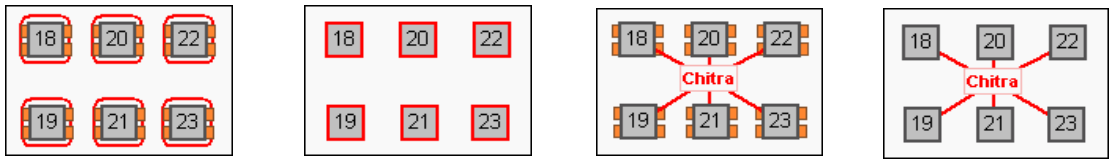


Figure 15-28: Server Section Display Options

To configure your server sections display:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Floor Management Settings** button. The *Floor Settings Tab* is displayed by default.
2. In the *Server Sections*, tap the **Table outlines** or **Webs** radio button.

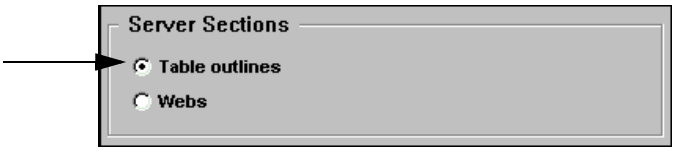


Figure 15-29: Configuring Server Sections Display in Floor View

3. Tap **Save** to save your changes.

Prioritize Floor View Arrivals

As guests begin to arrive at your restaurant, you can prioritize guest seating by time period or by shift. When you select *Within Each Time Period*, the system automatically prioritizes your guests in the *Floor View* based on the status and arrival time within each time period (7:15, 7:30, etc.). A party with a status of *All Arrived* will have a higher priority over a party that has the same reservation time but has a status of *Partially Arrived*. For example, if there are two reservations at 7:30 PM, one with a status of *All Arrived*, and one with a status of *Partially Arrived,* then the party that is *All Arrived* will be listed first in the *Priority (PR)* column.

When you select *For the Shift*, the system automatically prioritizes your guest seating across the entire shift. A party that arrives first in the shift with a status of *All Arrived* will be listed in the *Priority (PR)* column first. For example, if there is a reservation at 7:15 that is *Partially Arrived* and a reservation at 7:30 that is *All Arrived,* the 7:30 party will be prioritized higher in the *PR* column.

To configure how the system prioritizes *Floor View* arrivals:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Floor Management Settings** button. The *Floor Settings Tab* is displayed by default.

2. In the *Prioritize Floor View Arrivals* section, tap **Within each time period** or **For the Shift** radio button to set your priority arrival setting.
   - With this setting, you can have two parties marked as "1". For example, a 5:30 party and a 6:00 party that are both *All Arrived* will both be marked as "1".
   - The *For the Shift* option sets the order within the entire shift.

Figure 15-30: Prioritizing Floor View Arrivals

3. Tap **Save** to save your changes.
4. To view your priority arrival setting, tap the **Floor View** button on the *Side Navigation Bar*.
5. The number in the *Pr column* indicates the priority status of each party.

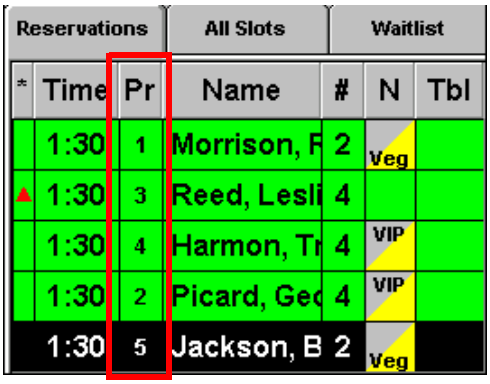

Reservations
All Slots
Waitlist
* Time Pr Name # N Tbl
1:30 1 Morrison, F 2 Veg
1:30 3 Reed, Lesli 4
1:30 4 Harmon, Tr 4 VIP
1:30 2 Picard, Ged 4 VIP
1:30 5 Jackson, B 2 Veg

Figure 15-31: Using Priority Status: Within Each Time Period

Waitlist Settings Tab

You can configure several different preferences on the *Waitlist Settings Tab*, including how guests are entered in the waitlist and which dining preferences are displayed in the *In-House Waitlist View*.

Figure 15-32: Waitlist Settings Tab

1	Search Guest Database	Check box to search for waitlist guests in the database	3	Preferences	Displays waitlist preferences 1 - 4 in Waitlist View
2	Display Pager ID	Check box to display Pager ID in Waitlist View			

Configuring How to Search for Waitlist Guests

You can configure the system to use one of two different methods for users to enter guest names in *Waitlist View*.

- When you check the first box, *Search for Waitlist guests in the database*, the *OpenTable* system searches for the guest in the guest database. Seating the guest will display the guest's name followed by "Walk-In" in parentheses. For example, a walk-in entry for John Smith would display "Smith, John (Walk-In)."
- If the first box is NOT selected, then the guest is entered into the *OpenTable* system as a single-user guests name. A single-use guest name is only associated with the waitlist or walk-in entry and is not saved in the guest database. Seating the guest will display the name "Walk-In" followed by

the guest's last name and first name in parentheses. For example, a walk-in entry for John Smith would display "Walk-In (Smith, John)."

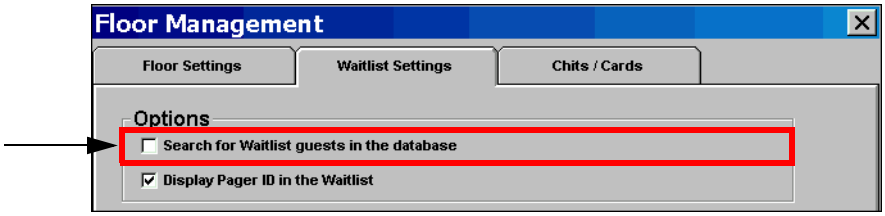


Figure 15-33: Configuring Guest Search Settings for the Waitlist

To configure how to search waitlist guests:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Floor Management Settings** button.
2. Tap the **Waitlist Settings Tab**.
3. Check or uncheck the box next to *Search for Waitlist guests in the database*.
4. Tap **Save** to save your changes.

Displaying Pager ID

Some restaurants that maintain a waitlist during a shift pass out numbered electronic pagers to waiting guests. When the guest's table is ready, the host or hostess pages the pager using their existing paging system. The guest returns to the host stand, turns in their pager, and is seated at their table. The *In-House Waitlist View* allows users to enter and track the pager number or ID in the guest's waitlist entry. To enable the Pager ID display in *In-House Waitlist View:*

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Floor Management Settings** button.
2. Tap the **Waitlist Settings Tab**.
3. Check the box next to *Display Pager ID in the Waitlist*.

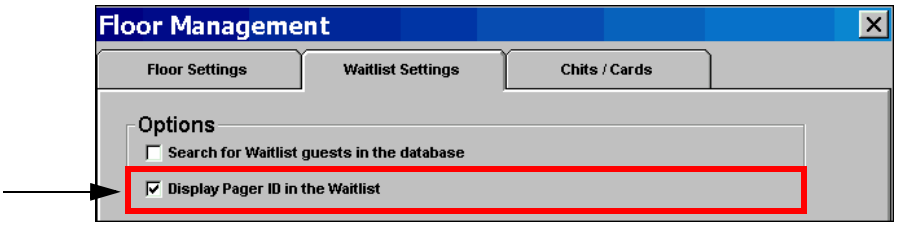


Figure 15-34: Display Pager ID in the Waitlist

4. Tap **Save** to save your changes.

Configuring Dining Preferences

Restaurants that maintain a wait during a shift often receive common requests from waiting guests that need to be tracked. Guest may have some type of table and/or dining room preference like smoking, outdoor, booth, etc. You can configure the waitlist to track up to four dining preferences for waiting parties.

Preferences appear as buttons on the *Add Waitlist Party Dialog / Edit Waitlist Party Dialog* and as columns in the *In-House Waitlist View*. When editing a waitlist entry, tapping the preference button selects that preference (and the associated reservation code). Tapping the preference button again de-selects the preference. If a preference is selected, a check appears in the appropriate preference column for the waiting party in the *In-House Waitlist View*. To configure the waitlist dining preferences:

Tap **Admin** on the *Side Navigation Bar.* Tap the **Floor Management Settings** button.

1. Tap the **Waitlist Settings Tab**.
2. Check the box next to any of the preferences (1-4) to enable the preference. A checkmark appears in the checkbox and the dropdown selection box becomes active for that preference.

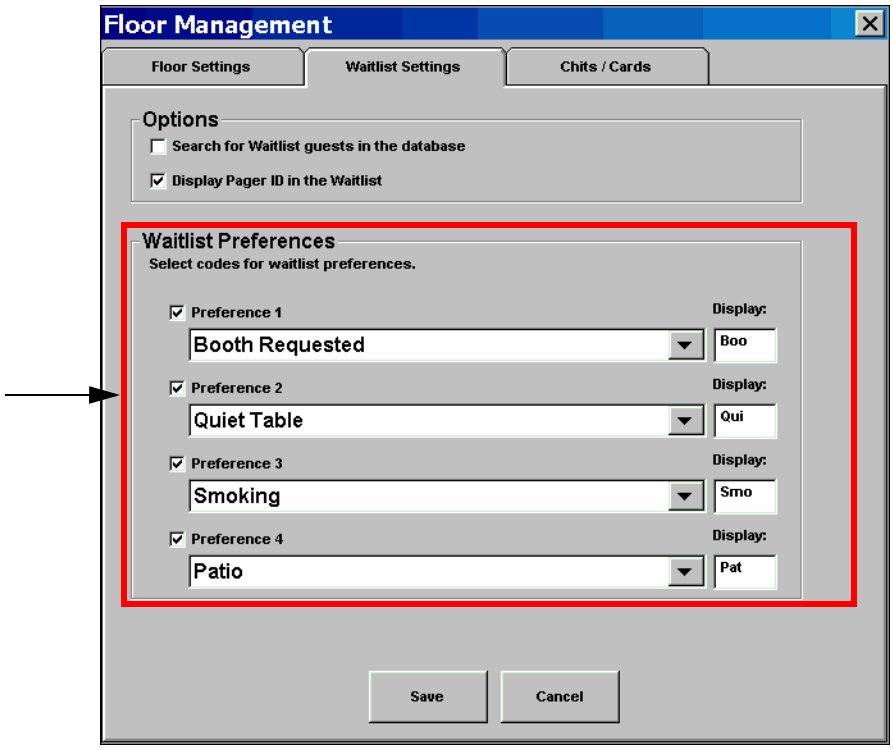


Figure 15-35: Configuring Guest Preferences for Waitlist View

3. Tap the dropdown control to display a list of all *Reservation Codes* in the system. The list is displayed in alphabetical order.
4. Tap the desired *Reservation Code* to select and use it for that preference. The *Display* field for that preference is populated with the 1st three letters of the code.
5. Edit the three letter abbreviation as desired. Note that the abbreviation cannot be left blank.
6. Continue to enable more preferences as needed.
7. Tap **Save** to save your changes. All enabled dining preferences will now be visible on the *Waitlist View* and the *Add Waitlist Party Dialog / Edit Waitlist Party Dialog*.

If you do not see the desired Reservation Code in the Dining Preference dropdown, add the Reservation Code to the system first in the Admin View / Lists Section and then return to this dialog to select the Reservation Code as a dining preference.

Chits / Cards Tab

Printing chits and guest cards for incoming guests is a useful way to leverage the information captured about the reservations and guests so that you can provide outstanding service. You can print chits / guest cards before each shift or as guests arrive and give them to your servers. The chit / guest card can contain useful information like table or food preferences, special requests, etc. that the server can use to deliver a great dining experience for the guest. You can print chits for both reservations and *In-House Waitlist*

entries. Use the *Chits / Cards Tab* to configure the printing and display options for the chit and guest card printouts.

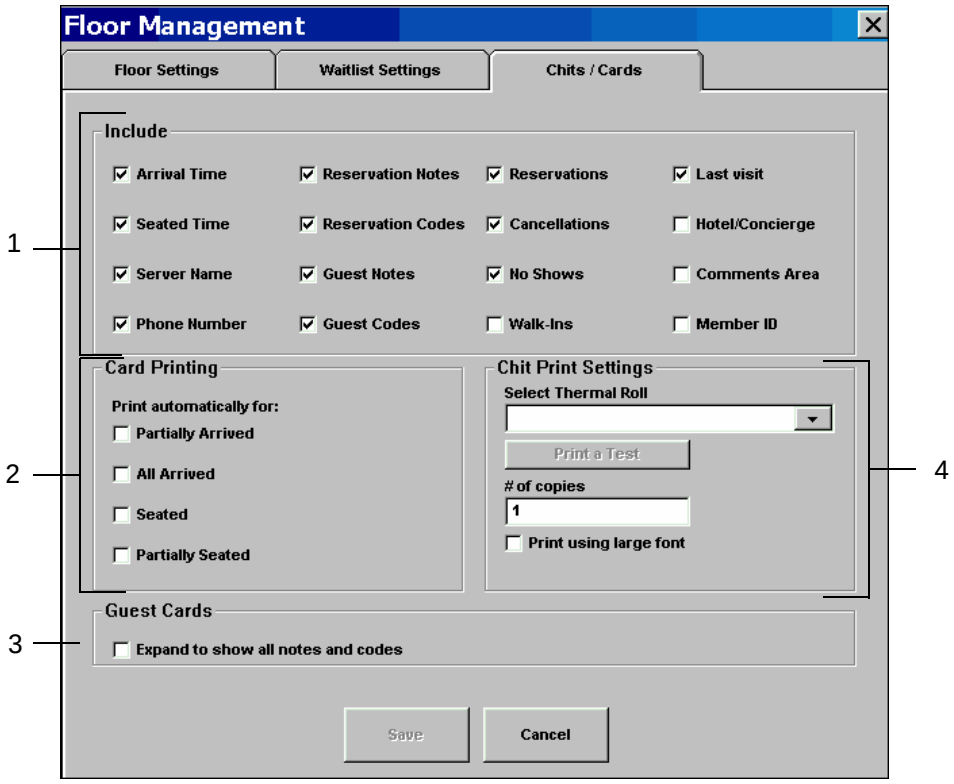


Figure 15-36: Chits / Cards Tab

1	Include	Select items to be included on the chits / cards	3	Guest Cards	Check box to show all notes and codes (Guest Cards only)
2	Card Printing	Select statuses that will automatically print a chit	4	Chit Print Settings	Enter chit print settings and number of copies to be printed

In order to print chits, you must purchase, connect, and install a thermal roll printer on the OpenTable terminal. Do NOT set your installed thermal roll printer as the default printer for your computer. Depending on your computer's operating system, you may need to install an alternate printer driver first as the default driver, and then install the thermal roll driver.

Include Settings

This section allows you to select the fields that you want to display when printing chits and guest cards. When printing *Reservation and Guest Notes and Codes*, the system will print ALL notes on chits. To configure chit/guest card settings:

1. Tap **Admin** on the *Side Navigation Bar.* Tap the **Floor Management Settings** button.
2. Tap the **Chits / Cards Tab**.

3. In the *Include* section, check all fields that you wish to include on the *Chit / Guest Card*. Fields with a checkmark next to them indicate that the field is selected for printing.

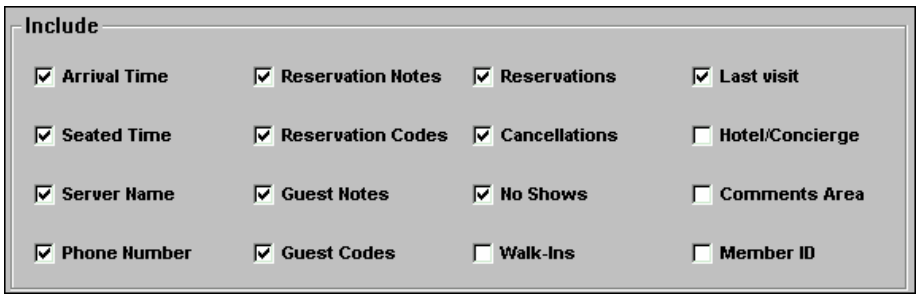


Figure 15-37: Include Setting in Chits / Cards Tab

4. Tap **Save** to save your changes.

Due to space limitations, Walk-Ins, Hotel (Concierge), and Comments area are available only for Chits and not Guest Cards.

Card and Chit Printing Settings

In the *Card Printing* section you can configure the chit to do the following:

- Print a chit automatically every time a reservation changes to one of the following four statuses: *Partially Arrived, Seated, All Arrived, Partially Seated.*
- Select the desired chit printer.
- Print multiple copies of a chit.
- Print chits using a large (12 point) font instead of the default font size (10 point).

To configure the chit/card settings:

1. Tap **Admin** on the *Side Navigation Bar.* Tap the **Floor Management Settings** button.
2. Tap the **Chits / Cards Tab**.
3. In the *Card Printing* section, check the party statuses that you want to trigger automatic chit printing.

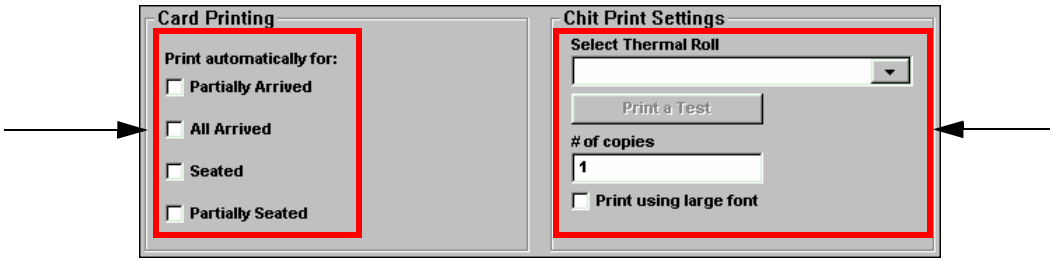


Figure 15-38: Configuring Chit / Card Printing Settings

4. In the *Chit Print Settings* section, tap the dropdown menu to select the *Chit Printer.*
5. In the *# of copies* section, enter the number of copies to print.
6. Check the box next to *Print using large font* if you want to print using a 12 point font size. (The default font size is 10 points.)
7. Tap **Save** to save your changes.

Printing Chits

To print chits:

1. Go to *Sheet View, Book View, Floor View, In-House View or Active Waitlist View* by tapping the appropriate button on the *Side Navigation Bar.*
2. Tap a reservation or waitlist entry to highlight it.
3. Tap the **Card** button on the *Top Navigation Bar.* The *OpenTable* system will print a chit for the highlighted waitlist entry or reservation.

Figure 15-39: Printing Chits Using the Card Button on the Top Navigation Bar

Guest Card Settings

The *Guest Card* report is designed to print reservation and guest details in a small 2" x 3" area on letter size or A4 paper. Because the print area is limited to 2" x 3", all of the selected information may not fit and some information may be truncated. You can configure the system to print all (*Reservation and Guest*) notes and codes on the *Guest Card* report by checking the *Expand to Show All Notes and Codes* option.

The Expand to Show All Notes and Codes option is only for printing guest cards. The system will always print all notes and codes for chits.

To configure guest card settings:

1. Tap **Admin** on the *Side Navigation Bar.* Tap the **Floor Management Settings** button.
2. Tap the **Chits / Cards Tab**.
3. In the *Guest Cards* section, check the box next to *Expand to Show All Notes and Codes* option if you want to print all notes and codes on your *Guest Cards*.

Figure 15-40: Configuring Guest Card Printing settings

4. Tap **Save** to save your changes.

Chapter 16: Lists

In the upper right portion of the *Admin View* is the *Lists* section. Tap the **Servers** button to manage your list of your servers and assign servers to a date and shift. Tap the **Reservation and Guest Codes** button to view a list of reservation and guest codes, which are used when making reservations and managing guest information. Select guest recognition codes to display in the various views to help your staff quickly identify VIPs and other guests. Tap the **Hotels and Concierges** button to view and manage your list of hotels and concierges that provide guest referrals.

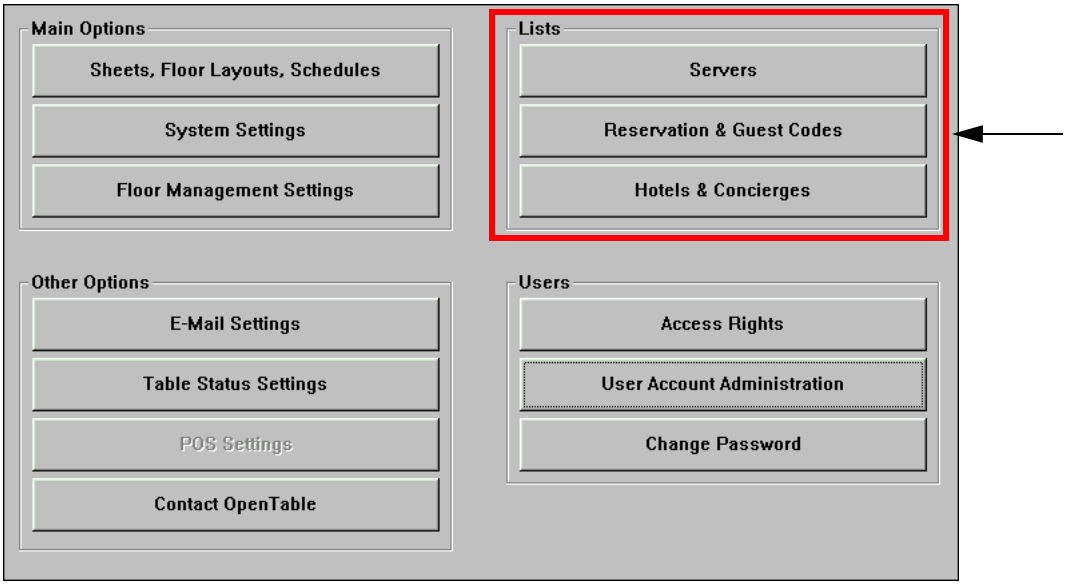


Figure 16-1: Admin View - Lists Section

Servers

In the *Servers* section you can add, delete or change server names, and assign or remove servers on a specific day and shift.

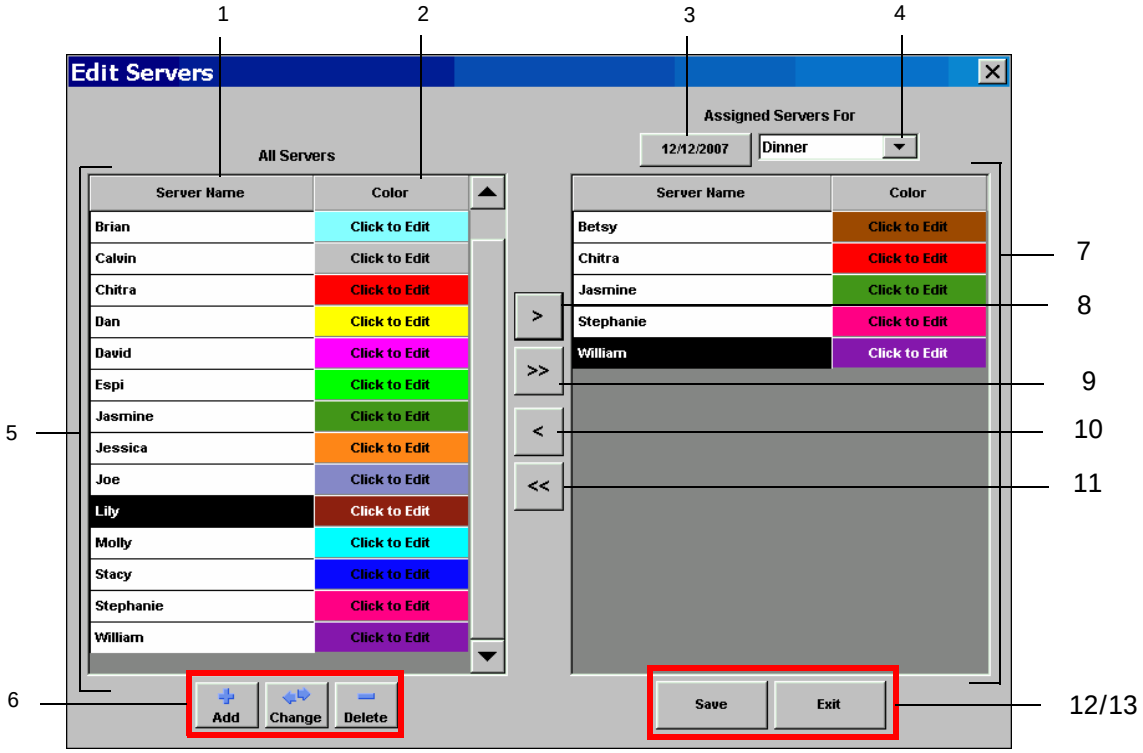


Figure 16-2: Edit Servers Dialog

1	Server Name	Server's name	8	Right Arrow	Add a server to the selected date and shift
2	Color	Select and edit color settings for each server	9	Double Right Arrow	Add ALL servers to the selected date and shift
3	Date	Select the date	10	Left Arrow	Remove server from the selected date and shift
4	Shift	Select the shift	11	Double Left Arrow	Remove ALL servers from the selected date and shift
5	All Servers List	Displays server names and colors	12	Save	Save your changes
6	Server Editing Controls	Controls for adding, changing, and deleting servers	13	Exit	Exit the Edit Server's Dialog and return to Admin View
7	Assigned Servers	Displays a list of servers assigned to the selected date and shift			

Adding a Server

To add a server:

1. Tap **Admin** on the *Side Navigation Bar*. Then tap the **Servers** button.

2. In the *Edit Servers Dialog*, tap the **Add** button at the bottom of the *All Servers Window* on the left. The system displays the *Add Server Dialog*.

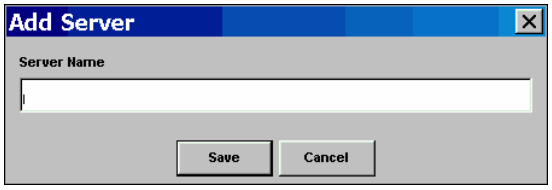


Figure 16-3: Add Server Dialog

3. In the *Add Server Dialog*, enter the name of your new server and tap **Save**. The server name is added to the list in the *All Servers Window* on the left.

Server names must be unique. If you attempt to add a server name that already exists, the system will display an error message and ask you to change the entry.

Deleting a Server

To delete a server:

1. Tap **Admin** on the *Side Navigation Bar.* Then, tap the **Servers** button.
2. In the the *Edit Servers Dialog,* tap the name of the desired server in the *All Servers Window* on the left.
3. Tap the **Delete** button at the bottom of the *All Servers Window* on the left. The system display a confirmation dialog.

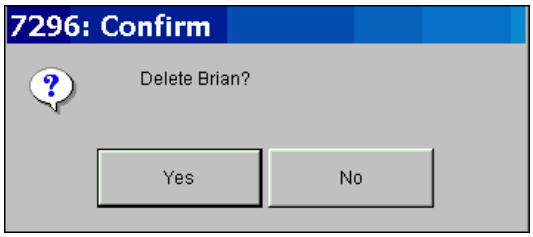


Figure 16-4: Delete Server Confirmation Dialog

4. Tap **Yes** to delete the server from the system.

Assigning Servers to a Shift

To assign servers to a shift:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Servers** button.
2. In the *Edit Servers Dialog*, use the date and shift controls in the upper right portion of the dialog to navigate to the desired date and shift.
3. Tap the server name in the *All Servers Window* (left side) and tap the single right arrow button (>). The selected servers appear in the *Assigned Servers Window* on the right.
4. If you want to assign all servers to the selected date and shift, tap the double right arrow button (>>). All servers will appear in the *Assigned Servers Window* on the right.
5. Tap **Save** at the bottom of the *Edit Servers Dialog* to save your server settings. The servers that appear in the *Assigned Servers Window* (right side) are now available for table assignments in *Floor View*.

6. In *Floor View*, assign tables to the available servers for the shift. For more information, refer to "Assigning Server Sections" on page 53.

To assign tables to the servers for that shift, use the Top Navigation Bar to go to the desired date and shift. Tap the Floor View on the Side Navigation Bar, and tap the Servers button to see the list of servers. You can only assign tables to servers for today's shifts.

Removing Servers from a Shift

To remove a server from a shift:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Servers** button.
2. In the *Edit Servers Dialog*, tap the server name on the *Assigned Servers Window* (right side) and tap the single left arrow button (<). The selected server is removed from the *Assigned Servers Window*. Repeat as necessary.
3. If you want to remove ALL servers from a shift, tap the double left arrow button (<<). All servers will be removed from the *Assigned Servers Window*.
4. Tap **Save** at the bottom of the *Edit Servers Dialog* to save your changes.

You cannot remove servers from a shift if parties have been seated in the server's section for that shift.

Reservation and Guest Codes

In the *Reservation and Guest Codes* section you can maintain your reservation and guest code lists that are used when making reservations and managing guest information. Codes can save time when taking reservations and are useful for segmenting and filtering information when generating reports.

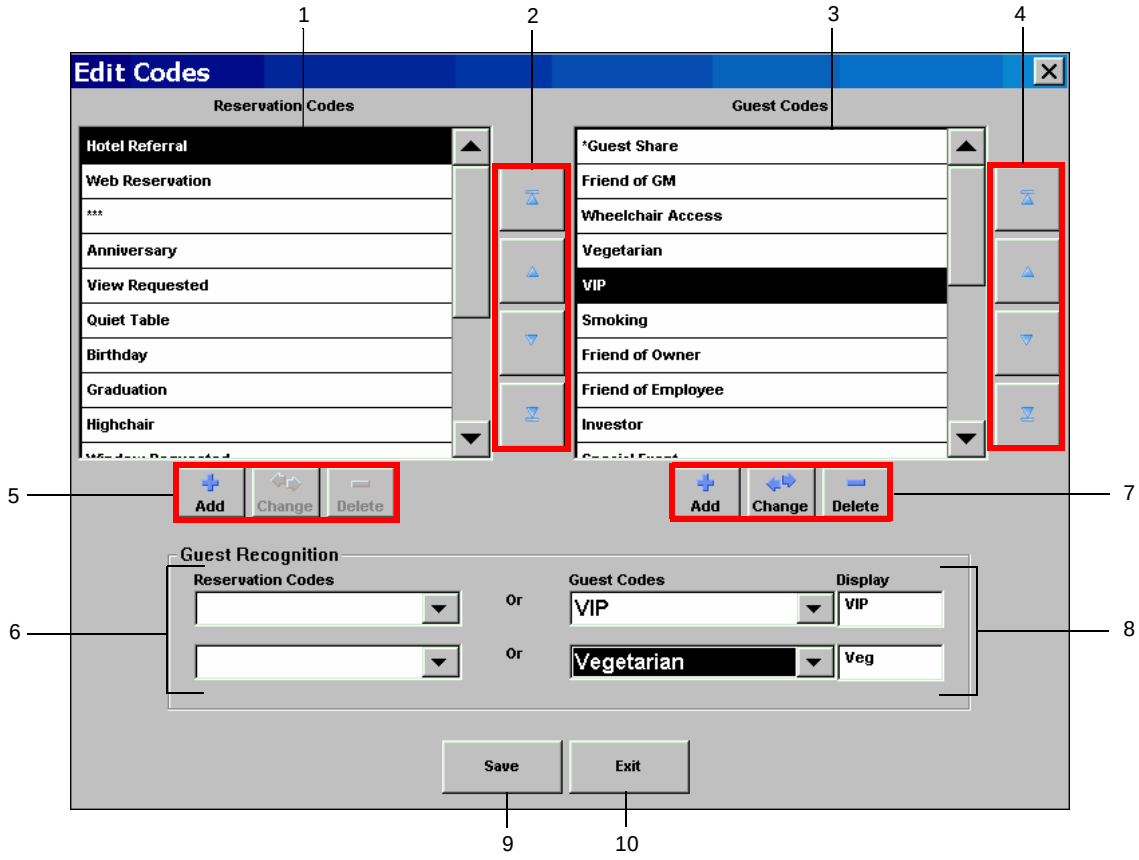


Figure 16-5: Admin View / Edit Codes Dialog

1	Reservation Codes	Displays a list of Reservation Codes	6	Guest Recognition Reservation Codes	Select two codes to be displayed in various views
2	Move Reservation Code Arrows	Controls to move Reservation Codes up or down the Reservation Codes list	7	Edit Guest Code Controls	Controls for adding, changing or deleting Guest Codes
3	Guest Codes	Displays a list of Guest Codes	8	Guest Recognition Guest Codes	Select two codes to be displayed in various views
4	Move Guest Code Arrows	Controls to move Guest Codes up or down the Guest Codes list	9	Save	Save your changes
5	Edit Reservation Code Controls	Controls for adding, changing, and deleting Reservation Codes	10	Exit	Exit the Edit Codes Dialog and return to Admin View

You can only select a maximum of 20 Guest Codes per guest and 20 Reservation Codes per reservation. Remember the Guest Codes are associated with guests and Reservation Codes are associated with reservations.

Adding a New Code

To add a new reservation and/or guest code:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Reservation and Guest Codes** button.
2. In the *Edit Codes Dialog*, tap the **Add** button underneath the type of code you want to add (*Reservation Codes* on the left and *Guest Codes* on the right). The system displays the *Add Reservation Code Dialog / Add Guest Code Dialog*.
3. In the *Add Guest Code Dialog,* enter a new code, then check the box next to *Allow Code to Print on Chits and Guest Cards* if you want this code to print.

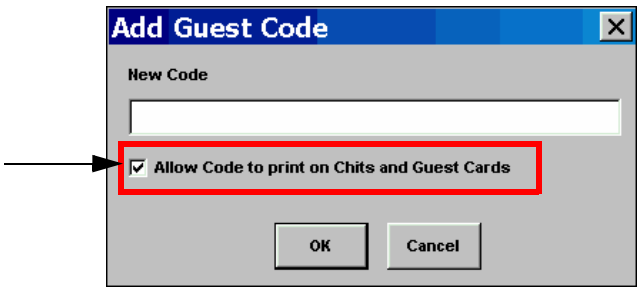


Figure 16-6: Add Guest Code Dialog

4. Tap **OK** to save your guest code.

The Allow Code To print... checkbox is only displayed for adding Guest Codes and not Reservation Codes.

Changing a Code

To change a reservation and / or guest code:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Reservation and Guest Codes** button.
2. In the *Edit Codes Dialog*, tap the code you want to change, then tap the **Change** button underneath the code you selected (*Reservation Codes* on the left and *Guest Codes* on the right). The system displays the *Edit Reservation Code Dialog / Edit Guest Code Dialog*.
3. In the *Edit Guest Code Dialog*, enter the new code, then check the box next to *Allow Code to Print on Chits and Guest Cards* if you want this code to print.
4. Tap **OK** to save you changes.

Deleting a Code

To delete a reservation and/or guest code:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Reservation and Guest Codes** button.
2. In the *Edit Codes Dialog*, tap the code you want to delete, then tap the **Delete** button underneath the code you selected (*Reservation Codes* on the left and *Guest Codes* on the right). The system displays the confirmation dialog.
3. Tap **Yes** to delete the code. The code is removed from all reservations / guests.

Changing the Display Order of the Code

To change the display order of the reservation and / or guest codes:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Reservation and Guest Codes** button.

2. In the *Edit Codes Dialog*, tap the reservation or guest code that you want to move up or down in the list and then tap the up or down arrows.

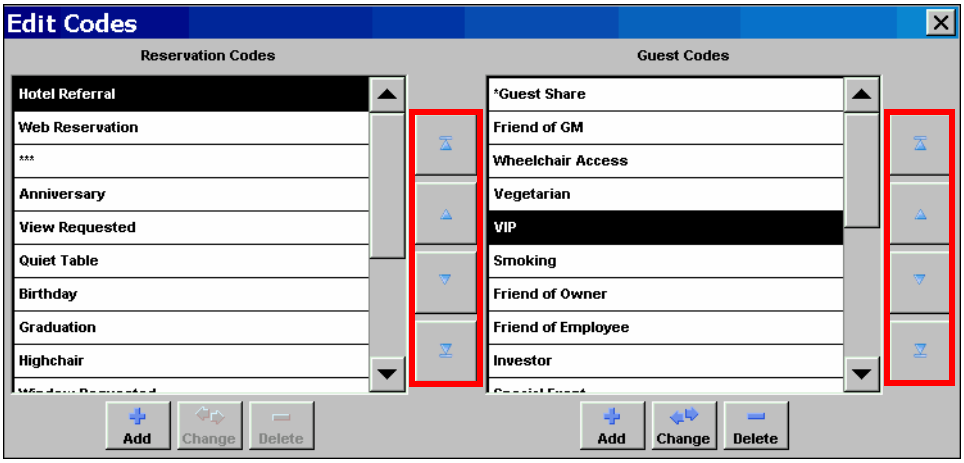


Figure 16-7: Move Codes Up or Down

3. Tap **Save** to save your changes.

Guest Recognition Settings

After setting up *Reservation and Guest Codes*, you can select any two codes to display in *Sheet View, Book View, Floor View, In-House Waitlist View, Future Waitlist View and Guests View*. This will enable your staff to immediately recognize VIPs and special reservations without viewing the reservation details.

Figure 16-8: Guest Recognition Settings

Setting Guest Recognition Codes

To set the guest recognition codes:

1. Tap **Admin** on the *Side Navigation Bar*. Then tap the **Reservation and Guest Codes** button.
2. At the bottom of the *Edit Codes Dialog*, select the desired codes from the dropdown lists in the *Guest Recognition* area. *Reservation Codes* are on the left and *Guest Codes* are on the right.
3. The system will display a three character abbreviation for the code in the *Display* field. This is how the *Guest Code* will display in the various views. You can edit this field and customize the abbreviation if desired.
4. Tap **Save** to save your settings.

Guest Recognition Codes in Sheet View

The *Guest Recognition Codes* that you selected appear in the *Notes (N)* column in the *Sheet View, Book View and Floor View, In-House Waitlist View and Future Waitlist View*.

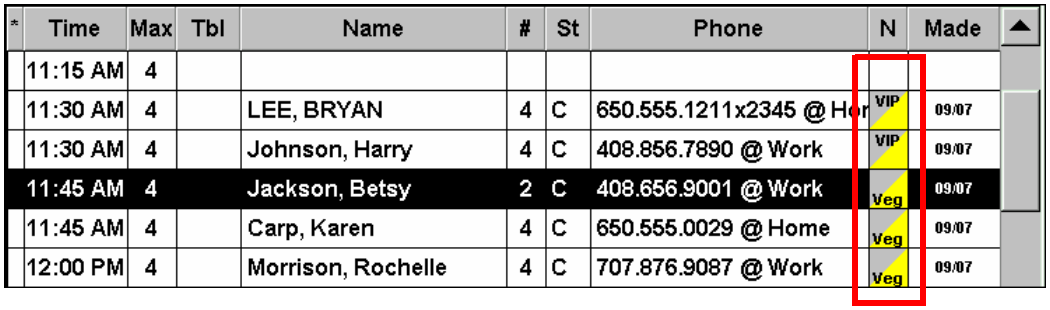

Time
Max
Tbl
Name
#
St
Phone
N
Made
11:15 AM 4
11:30 AM 4 LEE, BRYAN 4 C 650.555.1211x2345 @ Hor VIP 09/07
11:30 AM 4 Johnson, Harry 4 C 408.856.7890 @ Work VIP 09/07
11:45 AM 4 Jackson, Betsy 2 C 408.656.9001 @ Work Veg 09/07
11:45 AM 4 Carp, Karen 4 C 650.555.0029 @ Home Veg 09/07
12:00 PM 4 Morrison, Rochelle 4 C 707.876.9087 @ Work Veg 09/07

Figure 16-9: Guest Recognition Codes Displayed in Sheet View

Guest Recognition Codes in Guest View

Any *Guest Codes* that are selected as *Guest Recognition Codes* will also be displayed in the rightmost columns on the *Search Guest List Dialog* and *Guest Identification Dialog*.

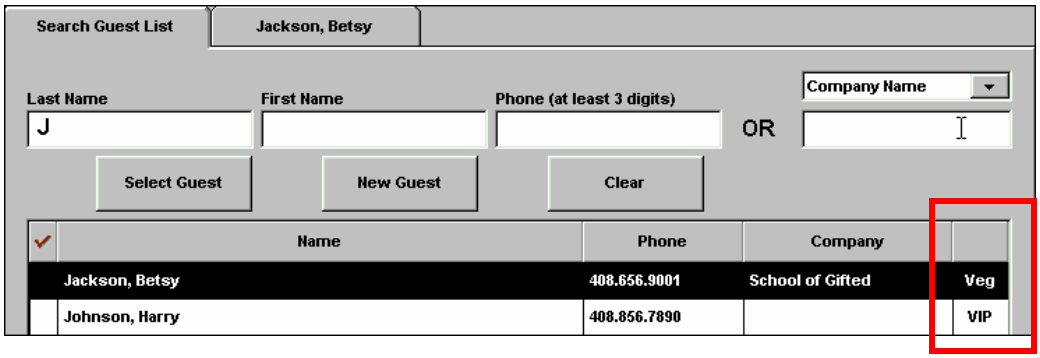


Figure 16-10: Guest Recognition Codes Displayed in the Search Guest Dialog

Hotels and Concierges

In the *Hotels and Concierges* section you can add, edit or delete hotels and concierges that provide guest referrals. After adding a hotel you can add the concierges that work at the hotel.

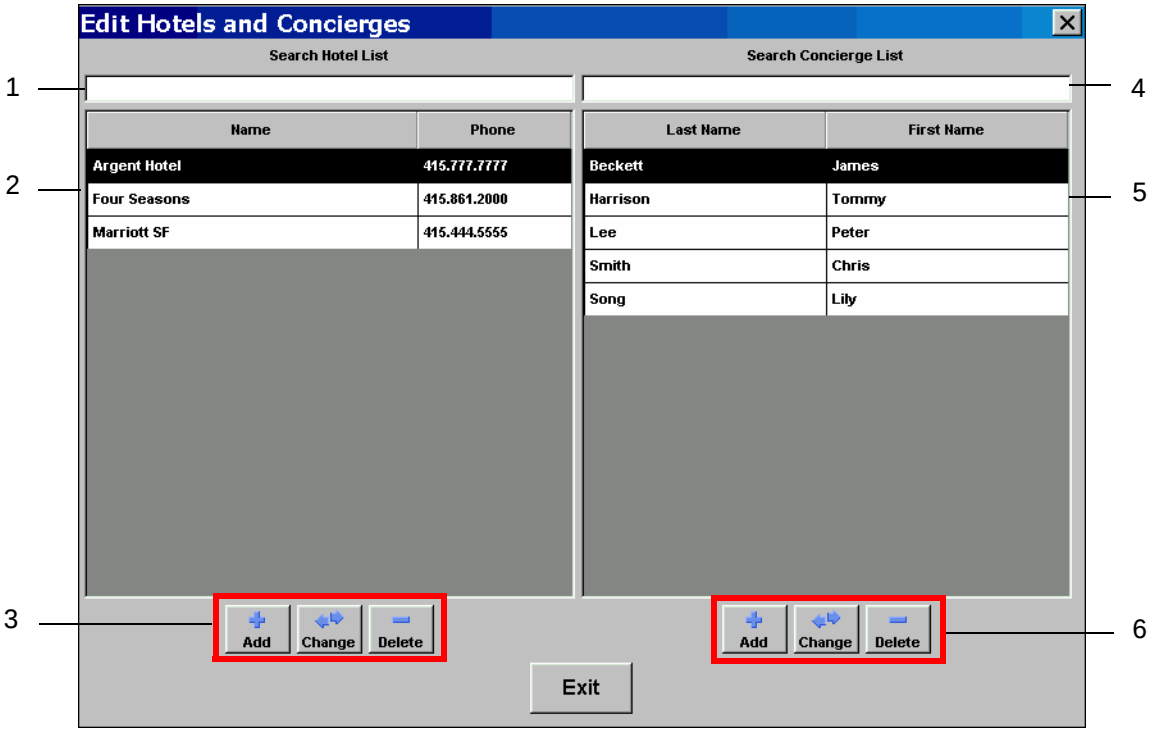


Figure 16-11: Edit Hotels and Concierges Dialog

1	Search Hotel List	Enter hotel name to start search	4	Search Concierge List	Enter concierge name to start search within the selected hotel
2	Hotel List	Displays a list of hotels in the system	5	Concierge List	Displays a list of concierges in the system
3	Hotel Editing Controls	Controls for adding, changing, and deleting hotels	6	Concierge Editing Controls	Controls for adding, changing, and deleting concierges

Adding a Hotel

To add a new hotel:

1. Tap **Admin** on the *Side Navigation Bar.* Then, tap the **Hotels and Concierges** button.
2. In the *Edit Hotels and Concierges Dialog*, tap the **Add** button underneath the *Hotel List*.

3. The system displays the *Add Hotel Dialog*. Enter the hotel name, address, and telephone number.

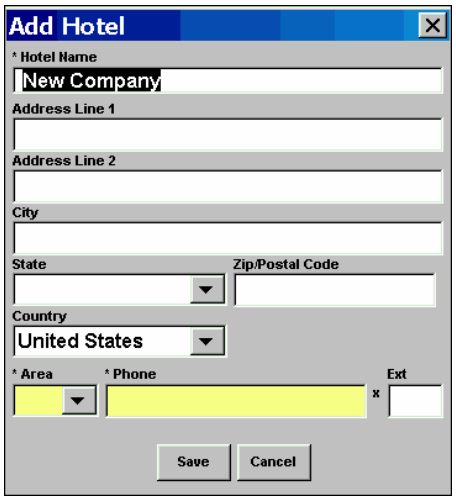


Figure 16-12: Add Hotel Dialog

4. Tap **Save** to save your changes. The hotel is added to the *Hotels List*.

Editing a Hotel

To edit a hotel's information:

1. Tap **Admin** on the *Side Navigation Bar.* Then, tap the **Hotels and Concierges** button.
2. In the *Edit Hotels and Concierges Dialog*, tap the hotel that you want to change.
3. Tap the **Change** button underneath the *Hotel List*. The system displays the *Edit Hotel Dialog*.

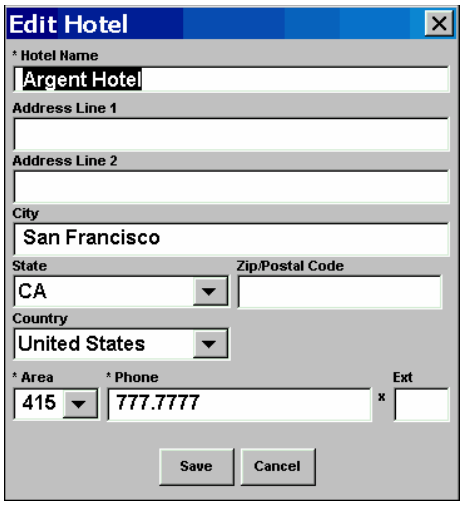


Figure 16-13: Edit Hotel Dialog

4. Make your changes
5. Tap **Save** to save your changes.

Deleting a Hotel

To delete a hotel:

1. Tap **Admin** on the *Side Navigation Bar.* Then, tap the **Hotels and Concierges** button.
2. In the *Edit Hotels and Concierges Dialog*, tap the hotel that you want to delete or type in the first few letters of the hotel name in the *Search Hotel List* field.
3. Tap the **Delete** button underneath the *Hotel List*. The system displays a confirmation dialog.

Figure 16-14: Delete Hotel Confirmation Dialog

4. Tap **Yes** to delete the hotel.

Adding a Concierge

To add a concierge to a hotel:

1. Tap **Admin** on the *Side Navigation Bar.* Then, tap the **Hotels and Concierges** button.
2. In the *Edit Hotels and Concierges Dialog*, tap the hotel where the concierge works. The system displays a list of concierge entries in the *Concierge List*.
3. Tap the **Add** button underneath the *Concierge List*. The system displays the *Add Concierge Dialog*.

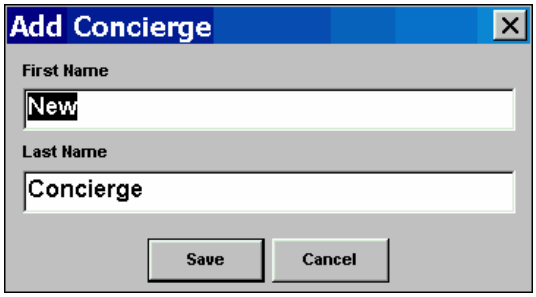


Figure 16-15: Add Concierge Dialog

4. Enter the concierge's first and last name.
5. Tap **Save** to save the concierge's information. The concierge's name is added to the *Concierge List*.

Editing a Concierge

To edit a concierge's information:

1. Tap **Admin** on the *Side Navigation Bar.* Then, tap the **Hotels and Concierges** button.
2. In the *Edit Hotels and Concierges Dialog*, tap the hotel where the concierge works. The system displays a list of concierge entries in the *Concierge List*.
3. Tap the concierge's name.

4. Tap the **Change** button underneath the *Concierge List*. The system displays the *Edit Concierge Dialog*.

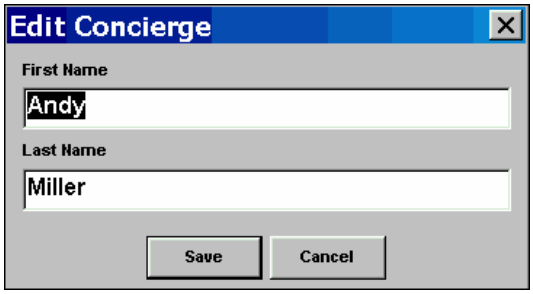


Figure 16-16: Edit Concierge Dialog

5. Make your changes.
6. Tap **Save** to save your changes.

Deleting a Concierge

To delete a concierge:

1. Tap **Admin** on the *Side Navigation Bar.* Then, tap the **Hotels and Concierges** button.
2. In the *Edit Hotels and Concierges Dialog*, tap the hotel where the concierge works. The system displays a list of concierge entries in the *Concierge List*.
3. Tap the concierge's name.
4. Tap the **Delete** button underneath the *Concierge List*. The system displays a confirmation dialog.

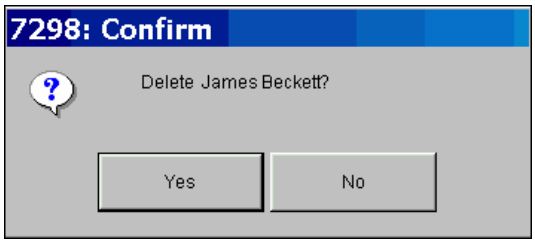


Figure 16-17: Delete Concierge Confirmation Dialog

5. Tap **Yes** to delete the concierge.

Chapter 17: Other Options

In the lower left portion of the *Admin View* is the *Other Options* section. Tap the **E-Mail Settings** button to configure your *E-Mail Settings* for sending E-Mails. Tap the **Table Status Settings** to configure your table status colors. For restaurants who have Point of Sale integration enabled, tap the **POS Settings** button to configure your POS settings. (The POS button is grayed out if POS integration is disabled.) Tap the **Contact OpenTable** button to send an E-Mail to *OpenTable Support* for assistance or to submit an enhancement suggestion.

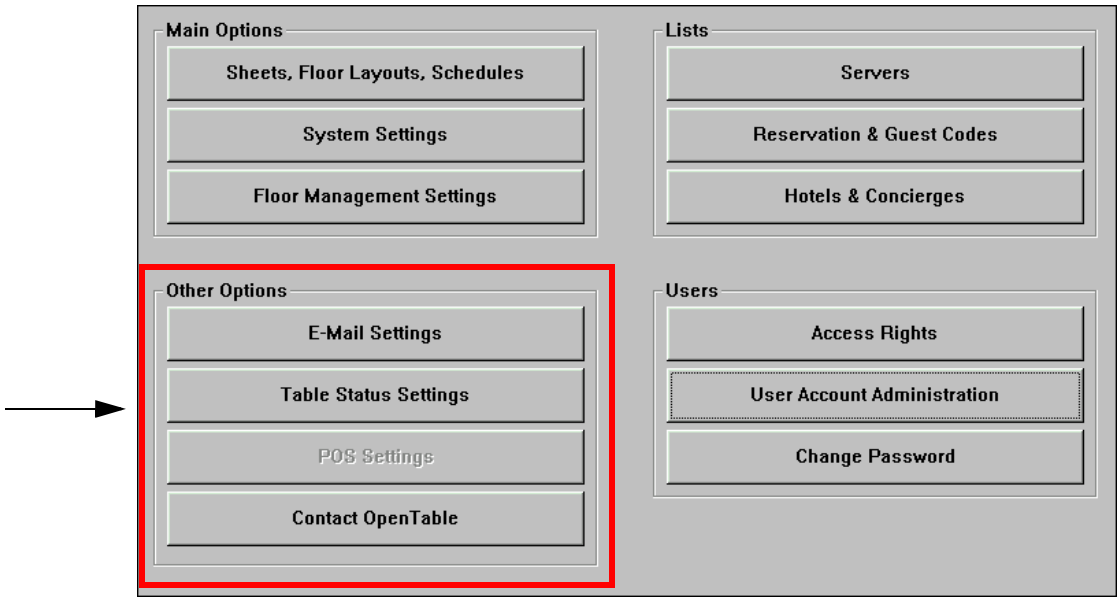


Figure 17-1: Admin View - Other Options

E-Mail Settings

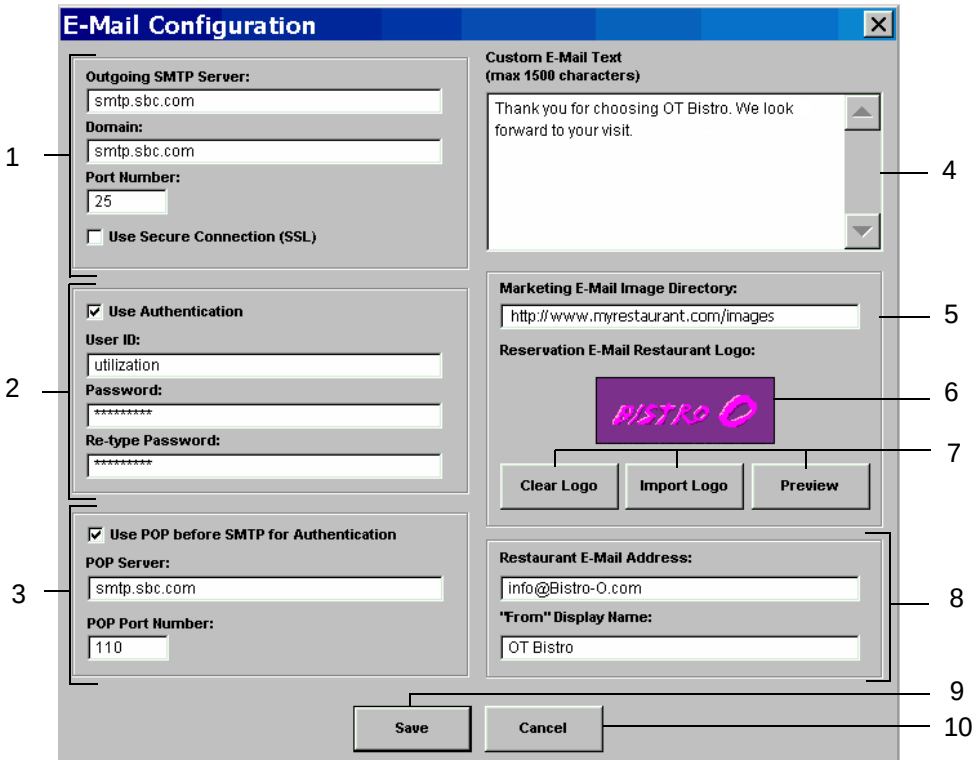


Figure 17-2: Admin View / E-Mail Configuration Dialog

1	E-Mail Settings	Enter E-Mail gateway settings	6	Logo Preview	Preview the restaurant logo
2	Authentication Settings	Enter Authentication settings	7	Logo Options	Options to clear a logo, import a logo or preview logo placement
3	POP Settings	Enter POP Mail Server settings	8	Restaurant E-Mail Address	Enter restaurant E-Mail address and restaurant name in “From” display
4	Custom E-Mail Text	Enter a customize message for reservation and reminder E-Mails	9	Save	Save your settings
5	Image Directory	Enter the path to the Marketing E-Mail Image Directory	10	Cancel	Cancel your changes

The *E-Mail Configuration Dialog* allows you to configure all your *E-Mail settings* for the *OpenTable* system for sending Marketing and reservation confirmation and reminder E-Mails including:

- E-Mail Gateway Settings.
- POP Mail Server Settings.
- Graphics Settings (image directory logo).
- Authentication Settings.
- Custom E-Mail Text.
- Restaurant E-Mail Address.

One important group of settings is the E-Mail gateway settings. These settings determine how your E-Mails get sent and your E-Mail gateway or server is used. Some restaurants may prefer to use a corporate E-Mail gateway or their Internet Service Provider’s E-Mail gateway instead of the *OpenTable* E-Mail gateway. If

you are unfamiliar with these types of settings, please contact your Information Technology department or contractor for assistance.

If you do not configure your E-Mail gateway settings properly, you will not be able to send out any E-Mails from the OpenTable system, including Marketing, Reservation Reminder, Confirmation and Cancellation E-Mails.

Configure Your E-Mail Settings

To configure your E-Mail settings:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **E-Mail Settings** button.
2. If your system is configured to password protect the ability to change your E-Mail settings, the system will prompt you for a password. Enter a valid password and tap **OK**.
3. Enter your E-Mail gateway settings, including:
   - Outgoing SMTP Server (for example, “smtp.sbc.com”).
   - Domain Name (for example, “smtp.sbc.com”).
   - Port Number (for example, “25”).
4. Check the box next to *Use Secure Connection (SSL)*, if you wish to use SSL.

Figure 17-3: Configuring E-Mail Gateway Settings

5. In the *Authentication* section, if you wish to use authentication, check the box next to *Use Authentication* and enter a User ID and Password to be used for authentication.

Figure 17-4: Configuring E-Mail Gateway Authentication Settings

6. In the *POP* (Post Office Protocol) section, if you wish to use POP, check the box next to *Use POP before SMTP for Authentication* and enter the POP Server and POP Port Number.

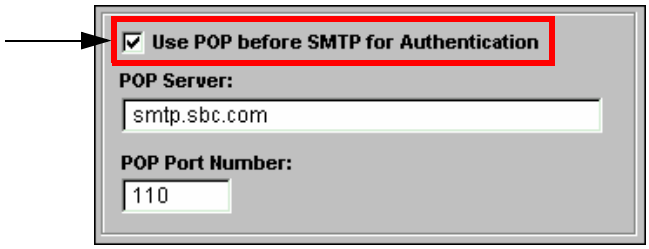


Figure 17-5: Configuring POP Settings

7. In the *Custom E-Mail Text* section, enter a custom message in the *message field*. This message will appear in your reservation confirmation and reminder E-Mails (maximum of 1500 characters). This is typically information about a dress code, cancellation policy, etc.

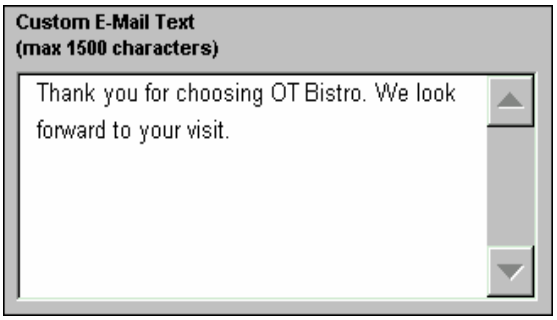


Figure 17-6: Custom E-Mail Text

8. In the *Marketing E-Mail Image Directory:* section, enter the path of your graphics file repository (for example, “http://www.myrestaurant.com/images”). This directory is the default storage location for all the images that you use for Marketing E-Mails (when inserting image links). The value you enter here will be entered in the *Insert Image Link Dialog* by default.

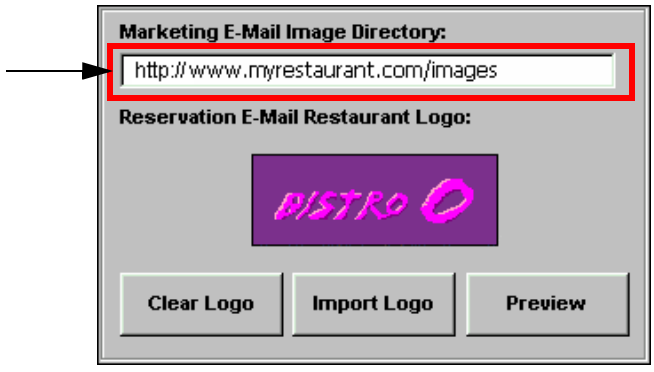


Figure 17-7: Configuring Image Directory and Import Logo

9. If you want to insert your restaurant logo at the top of all phone reservation, confirmation, reminder and cancellation E-Mails, you can import your logo by tapping the **Import Logo** button and selecting the logo graphics file from your computer. The system will display a thumbnail of the logo. Tap the **Preview** button to get a preview of your confirmation E-Mail with your imported logo. To remove the

restaurant logo from the *OpenTable* system, tap the **Clear Logo** button and tap **Save**. This only removes the logo from the *OpenTable* system. It does not delete the graphics file from your computer.

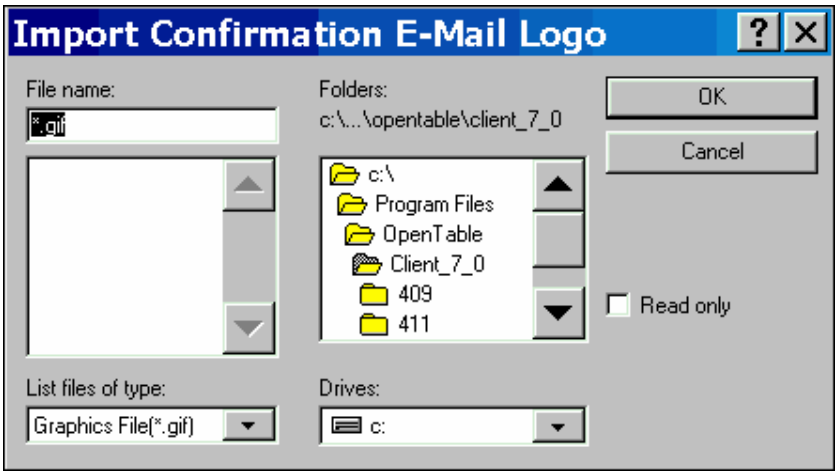


Figure 17-8: Import Confirmation E-Mail Logo Dialog

The graphics file containing the logo must be a GIF (Graphics Interface Format) and must be smaller than 128 pixels high (two inches) by 753 pixels wide (about one screen width).

10. In the *Restaurant's E-Mail Address:* section, enter the restaurant's E-Mail address. This is the address that will receive any E-Mail replies from guests and should be checked regularly.

Figure 17-9: Configuring Restaurant E-Mail Address Settings

11. In the *"From" Display Name:* field, enter the "From" name, which will be used on all Marketing, reservation reminder and confirmation E-Mails that your guests receive from you.
12. Tap **Save** to save your changes.

Table Status Settings

The *Table Status Settings* section allows you to change reservation status colors and status code abbreviations. These settings will be reflected in the *Sheet View, Book View, Floor View*, *In-House View and Wait-list View*. You can configure the color scheme of the status codes to suit your needs.

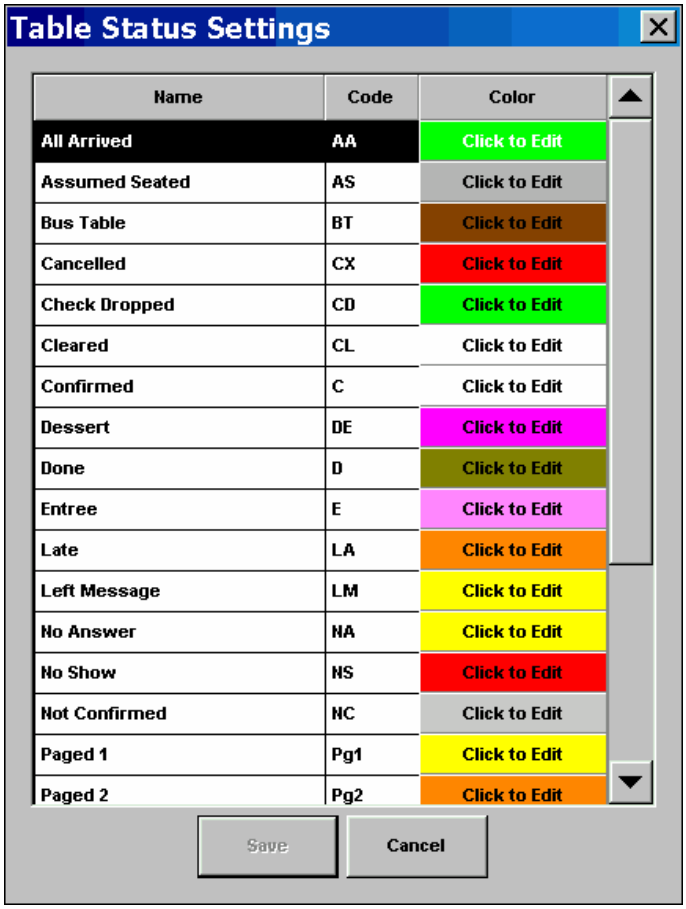


Figure 17-10: Admin View / Table Status Settings Dialog

Changing a Status Color

To change a status color:

1. Tap **Admin** on the *Side Navigation Bar*. Then tap the **Table Status Settings** button. The *Table Status Settings Dialog* is displayed.
2. Tap the **Click to Edit** button for the code that you want to change. The *Color Dialog* is displayed.
3. Select a new color for your table status. Tap **OK**.
4. Tap **Save** to save your changes.

Changing a Status Code

To change the abbreviation or status code:

1. Tap **Admin** on the *Side Navigation Bar*. Then tap the **Table Status Settings** button. The *Table Status Settings Dialog* is displayed.
2. Double-tap the code that you want to change. A cursor will appear in the *Code field*.

3. Enter a new code and hit **Enter** on your keyboard.
4. Tap **Save** to save your changes.

POS Settings

Point of Sale (POS) integration is a separate service and is not available in all markets. For more details about configuring POS Integration, please refer to the POS Integration User Manual.

Contact OpenTable

You can report a problem or suggest a product enhancement by sending an E-Mail to *OpenTable* Customer Support. To send an E-Mail to OpenTable Customer Support:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Contact OpenTable** button.
2. Enter a subject in the *Subject Line*. In the *Priority of Message* section, select the desired radio button:
   - Urgent - to report a problem.
   - Enhancement Request - to suggest a product enhancement.
3. Type your message in the *message* area.

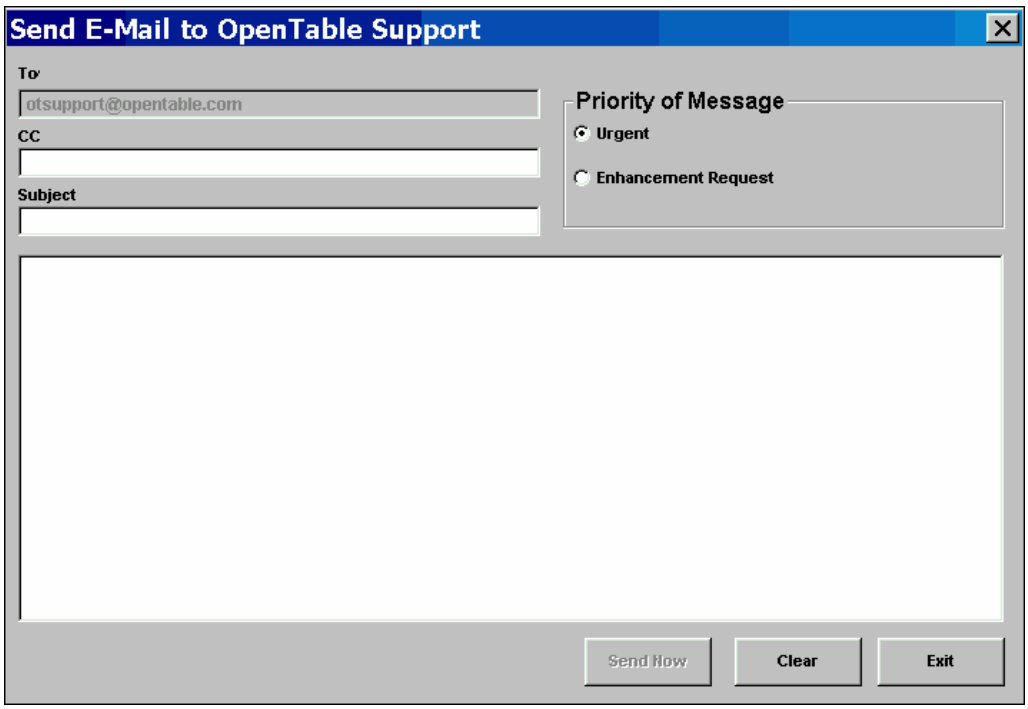


Figure 17-11: Admin View / Contact OpenTable

4. Tap **Send Now** to send your message.

Chapter 18: Users

In the lower right portion of the *Admin View* is the *Users* section. Tap the **Access Rights** button to set and control access to password protected features on the *OpenTable* system. Tap the **User Account Administration** button to create user accounts and assign them access rights. Tap the **Change Password** button to change your password.

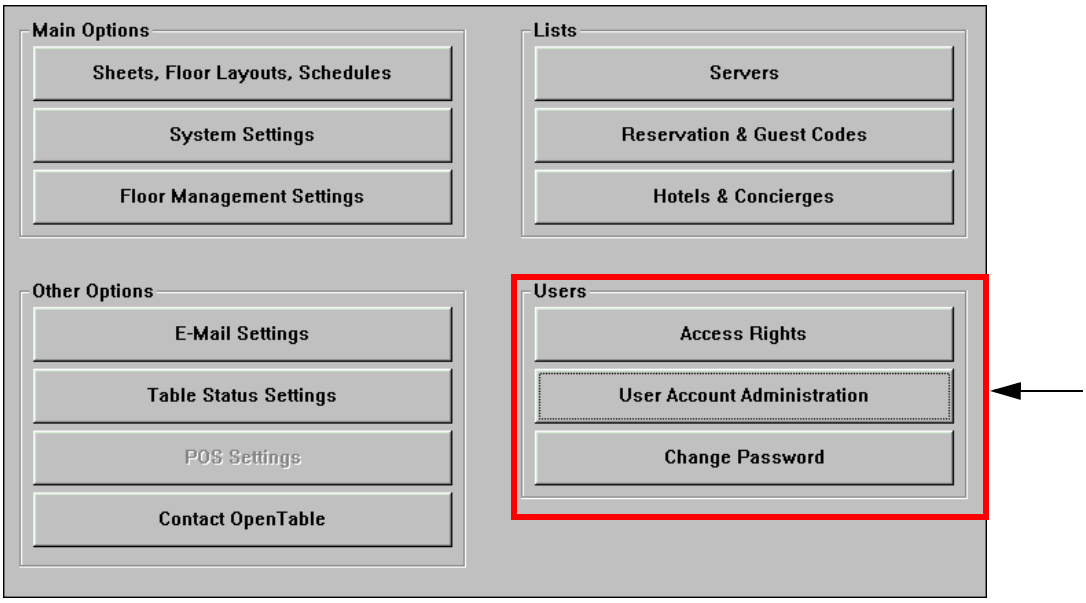


Figure 18-1: Admin View - Users

Access Rights

The *Access Rights* section allows restaurant management to lock certain features and require a password before an action can be completed.

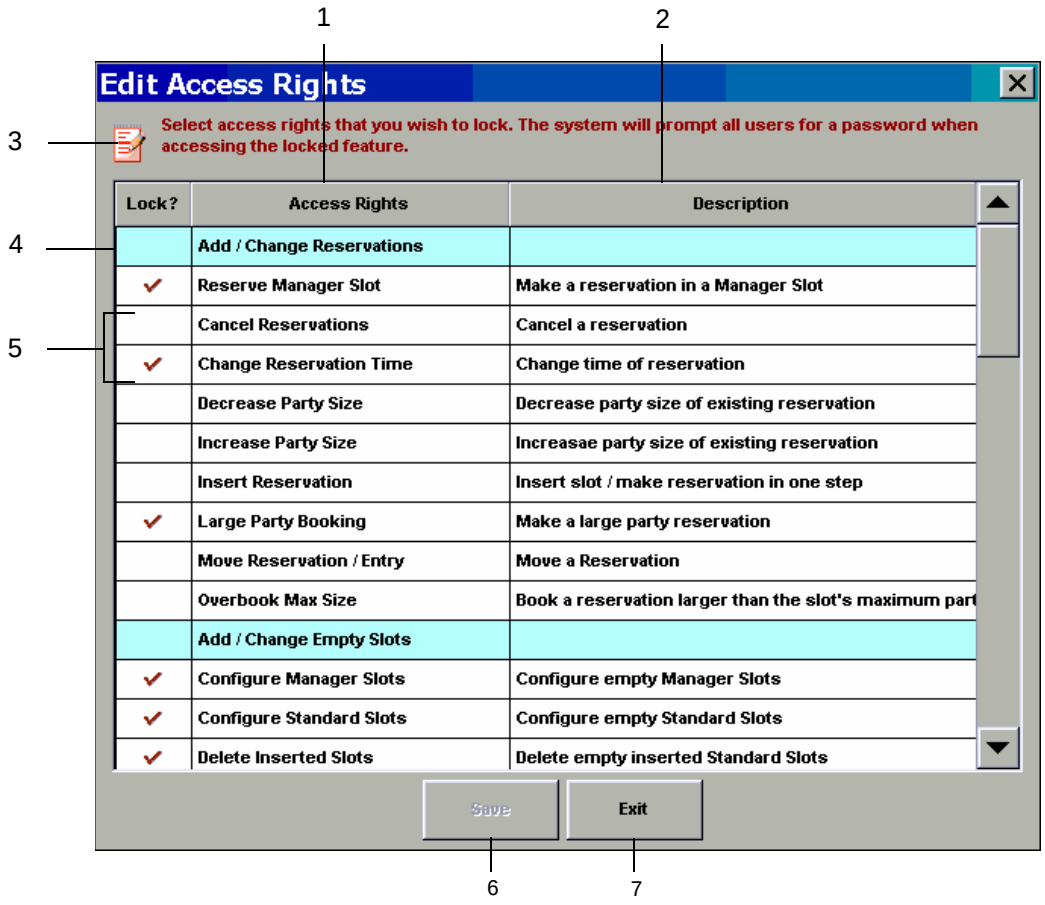


Figure 18-2: Admin View / Edit Access Rights Dialog

1	Access Rights	Lists each feature that can be locked	5	Checked / Unchecked items	Checked items are locked (requires a password) and unchecked items are un-locked (do not require a password)
2	Description	Description of each feature	6	Save	Save your changes
3	Instructions	Provides instructions on what to do	7	Exit	Exit and return to the Admin View
4	Category Headings	Features are grouped into categories			

Features and Descriptions of User Access Rights

The following areas can be password protected:

Access Rights	Descriptions
Add / Change Reservations	
Reserve Manager Slot	Make a reservation in a Manager Slot
Cancel Reservations	Cancel a reservation
Change Reservation Time	Change time of reservation
Decrease Party Size	Decrease party size of existing reservation
Increase Party Size	Increases party size of existing reservation
Insert Reservation	Insert slot / make a reservation in one step
Large Party Booking	Make a large party reservation
Move Reservation / Entry	Move a Reservation
Overbook Max Size	Book a reservation larger than the slot's maximum party
Add / Change Empty Slots	
Configure Manager Slots	Configure empty Manager Slots
Configure Standard Slots	Configure empty Standard Slots
Delete Inserted Slots	Delete empty inserted Standard Slots
Insert Standard Slots	Insert empty Standard Slots
Unblock Slots	Unblock empty slots
Generate Reports	
Access Reports	Access All Reports
Export Data	Export guests and reports
Marketing E-Mail	Send Marketing E-Mails
Print Reports	Print Reports
Run Guest Reports	Run the Guest Reports
Maintain Guests	
Delete Guests	Delete guests
Merge Guests	Merge guests
Add / Change Credit Cards	
Credit Card Administration	Access credit card information

Table 18-1: List of User Access Rights Features and Descriptions

Access Rights	Descriptions
Administration	
Admin View	Access the Admin View
Main Options	
Sheets, Floor Layouts, Schedules	Change sheets, floor layouts, and schedules
Schedules Tab / Wizard	Change schedules
Reservation Sheets Tab	Add, change, delete reservation sheets
Floor Layouts Tab	Add, change, delete floor layouts
System Settings	Access System Settings
Floor Management Settings	Access Floor Management Settings
List	
Servers	Add, change, delete Servers
Reservation and Guest Codes	Add, change, delete Reservation and Guest Codes
Hotels and Concierges	Add, change, delete Hotels and Concierges
Other Options	
E-Mail Settings	Change E-Mail Settings
Table Status Settings	Change Table Status Settings
POS Settings	Change POS Settings
Screen Saver	Clear the screen saver
Users	
Access Rights	Access Rights
User Account Administration	Add, change, delete users
Change Password	Change user passwords

Table 18-1: List of User Access Rights Features and Descriptions

Locking Features

To lock a feature and require a password:

1. Tap **Admin** on the *Side Navigation Bar*. Tap the **Access Rights** button. The *Edit Access Rights Dialog* is displayed.
2. Scroll down the list of features until you find the feature that you want to lock.
3. Tap the blank space (under the *Lock* column) next to the feature. A checkmark appears, indicating this feature now requires a password to access it.
4. Tap **Save** to save your changes.

Unlocking Features

To unlock a feature:

1. Tap **Admin** on the *Side Navigation Bar*. Tap the **Access Rights** button. The *Edit Access Rights Dialog* is displayed.
2. Scroll down the list of features until you find the feature you want to unlock.
3. Tap the checkmark to unlock the feature. The checkmark disappears and a password is no longer required to access this feature.
4. Tap **Save** to save your changes.

User Account Administration

After configuring system *Access Rights,* you can create different user accounts that have access to some or all password protected features. For example, you may want to allow your host and reservation staff to have access to a few select features while giving your managers access to most or all features.

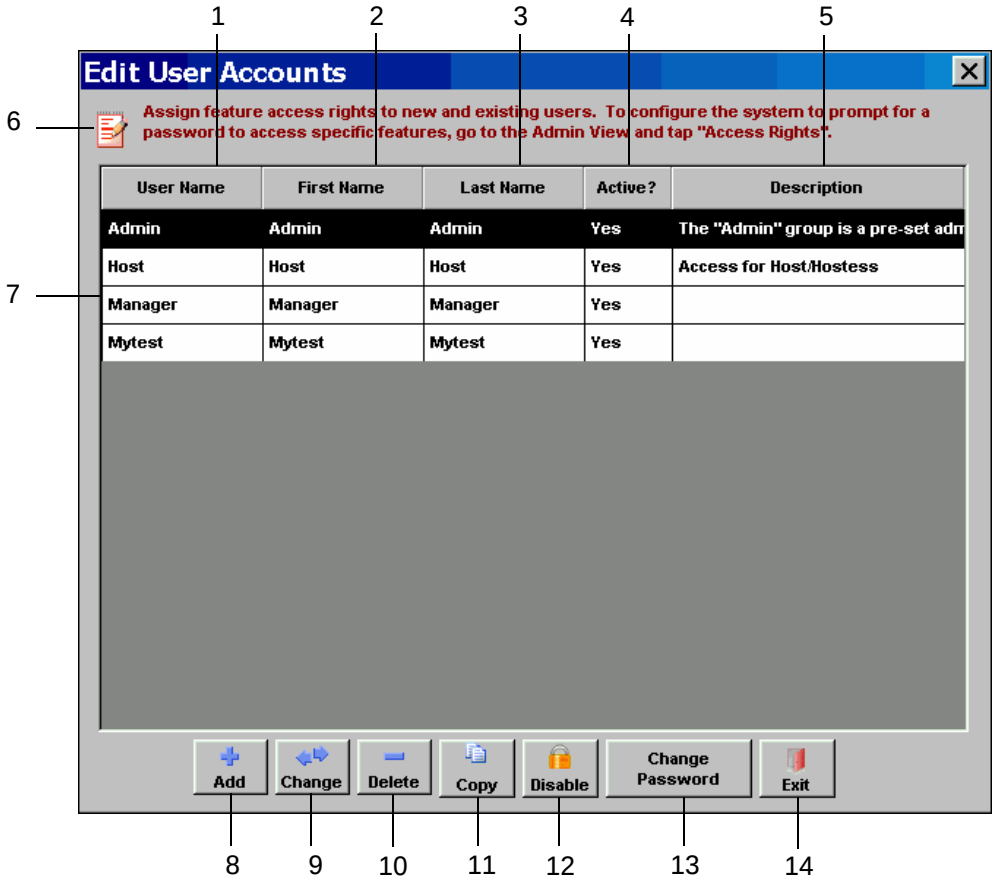


Figure 18-3: Admin View / Edit User Accounts

1	User Name	User name	8	Add	Add a new user account
2	First Name	First name of user	9	Change	Edit user account
3	Last Name	Last name of user	10	Delete	Delete user account
4	Active?	Status of user account	11	Copy	Copy an existing user account to create a new account
5	Description	Description of user account	12	Disable	Disable user's account
6	Instructions	Provides instructions on what to do	13	Change Password	Change user's password
7	Users	Displays a list of user / accounts	14	Exit	Exit and return to Admin View

Add a new User Account

To add a new user account:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **User Account Administration** button. The *Edit User Accounts Dialog* is displayed.

2. Tap **Add** at the bottom of the dialog. The *Add User Dialog* is displayed.

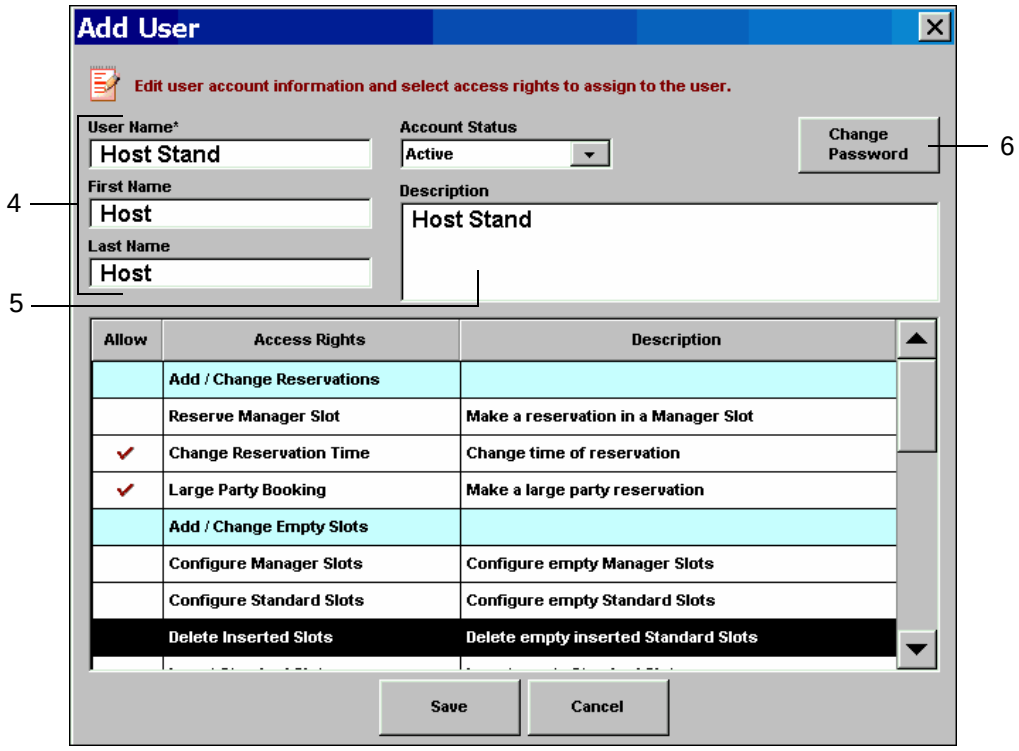


Figure 18-4: Add User Dialog

3. Enter a *User Name, First Name and Last Name*.
4. Enter a description in the *Description* field.
5. Tap the **Change Password** button to set the user's password.
6. Tap the the blank column (under *Allow* column) next to the features that you want the user to have access to. A checkmark will appear in the *Allow* column. Tapping the feature again removes the checkmark and the user will no longer have access to this feature.
7. Tap **Save** to save your changes. The user's password will allow the user to access all features that have a checkmark next to it.

Edit User Account

To edit a user account:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **User Account Administration** button. The *Edit User Accounts Dialog* is displayed.
2. Highlight the user that you want to edit.

3. Tap **Change** at the bottom of the dialog. The *Edit User Dialog* is displayed.

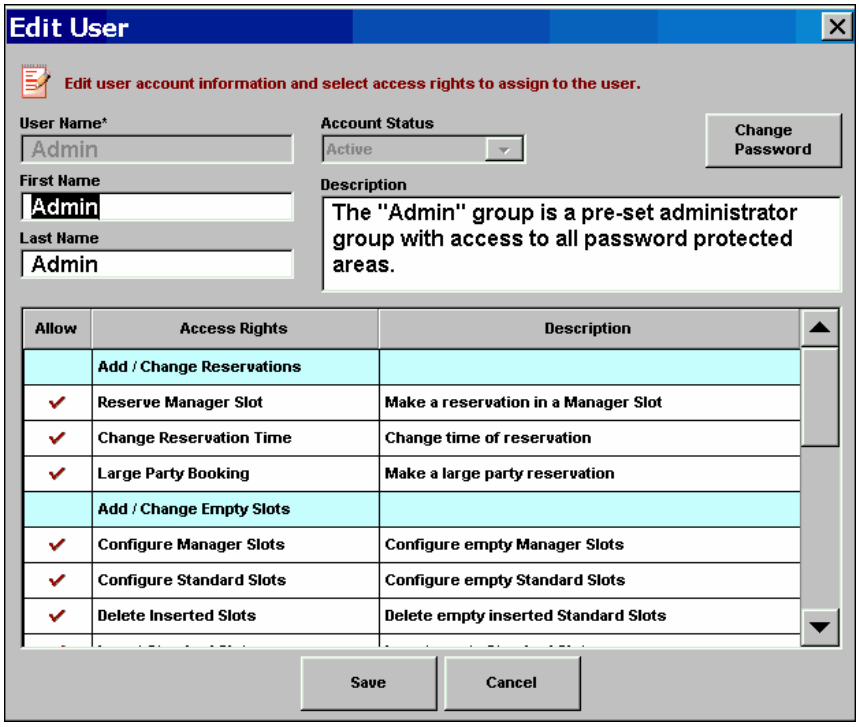


Figure 18-5: Edit User Dialog

4. Make the necessary changes.
5. Tap **Save** to save your changes.

When a user tries to use a locked feature, the system will prompt the user for a password. After the user enters their password, the system checks to see if the user has access to the feature.

Delete a User Account

To delete a user account:

1. Tap **Admin** on the *Side Navigation Bar*. Then tap the **User Account Administration** button. The *Edit User Accounts Dialog* is displayed.
2. Highlight the user that you want to delete.
3. Tap **Delete** at the bottom of the dialog. A confirmation dialog is displayed.

Figure 18-6: Delete User Confirmation Dialog

4. Tap **Yes** to delete the user.

Copy a User Account

To copy a user account:

1. Tap **Admin** on the *Side Navigation Bar*. Then tap the **User Account Administration** button. The *Edit User Accounts Dialog* is displayed.
2. Highlight the user that you want to copy.
3. Tap **Copy** at the bottom of the dialog. The *Copy User Account Dialog* is displayed.

Figure 18-7: Copy User Account Dialog

4. Enter a new *User Name, First Name and Last Name*.
5. Enter a password (minimum 7 characters). Then re-enter the same password.
6. Tap **Save** to save your changes.

Disabling a User Account

To disable a user account:

1. Tap **Admin** on the *Side Navigation Bar*. Then tap the **User Account Administration** button. The *Edit User Accounts Dialog* is displayed.
2. Highlight the user account that you want to disable.
3. Tap **Disable** (lock icon) at the bottom of the dialog to disable the user account. The user account status now says, “No” in the *Active ?* column. This user account will no longer have access to any of the password-protected features.

Enable a User Account

To enable a user account:

1. Tap **Admin** on the *Side Navigation Bar*. Then tap the **User Account Administration** button. The *Edit User Accounts Dialog* is displayed.
2. Highlight the user account that you want to enable.
3. Tap **Change** at the bottom of the dialog. The *Edit User Dialog* is displayed.
4. In the *Account Status* section, tap the dropdown and select **Active**. Tap **Save** to save your changes.

Change User Password

If you need to change or reset a password, you can do this without knowing the old password. Simply enter a new password and re-enter the password again to confirm.

To change or reset a user's password:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **User Account Administration** button. The *Edit User Accounts Dialog* is displayed.
2. Highlight the user that you want to change the password.
3. Tap the **Change Password** button on the bottom of the dialog. The *Change Password Dialog* is displayed.

Figure 18-8: Change User's Password

4. Enter a new password (minimum of 7 characters). Then re-enter the same password.
5. Tap **Save** to save your changes.

Change Password

When you need to change your password or another user's password, you can do this by going to *Admin View* and tapping the **Change Password** button. You must have the old password in order to change it. If you or a user forgets their old password, then you must go to the *User Account Administration* section. (For more information, refer to the *Change User Password* section above.)

To change a user's password:

1. Tap **Admin** on the *Side Navigation Bar.* Then tap the **Change Password** button.
2. If your system is configured to password protect the ability to change passwords, the system will prompt you for a password. Enter a valid password and tap **OK**.
3. The *Change Password Dialog* is displayed.

Figure 18-9: Change Password Dialog

4. Enter the old password.
5. Enter a new password (minimum 7 characters). Then re-enter the new password to confirm.
6. Tap **Save** to save your changes.

Chapter 19: Reports View

The *OpenTable* system is delivered with a set of pre-configured operational reports and marketing capabilities, including:

- Concierge Report
- Close of Shift Report
- Reservation, Cancellation & No Show Report
- Guest Report
- Cover Count Report
- Guest Cards
- In-House Waitlist Report
- Special Occasions
- (Marketing) E-Mail
- Mailing Labels
- Guest Export

Features of the Reports View

To access the reports, tap the **Reports** button on the *Side Navigation Bar* and tap the appropriate button to run the desired report. In general, you will be able to set various configuration options for each of the reports to control the report output (data filtering, sort order, date ranges, shift selections, etc.).

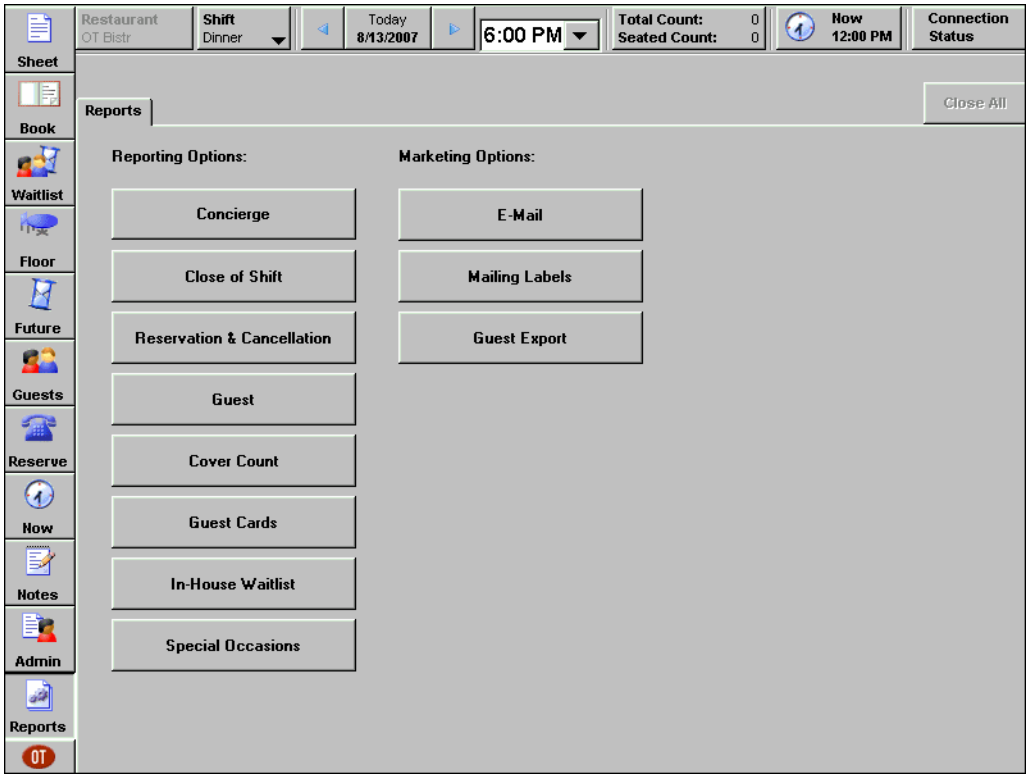


Figure 19-1: Reports View

Concierge Report

The *Concierge Report* generates concierge reservation referral statistics. Referral information is captured when making reservations in the system using the **Concierge Referral** button in the lower left hand portion of the *Make A Reservation Dialog*.

Figure 19-2: Concierge Indicator in the Make A Reservation Dialog

To run a concierge report:

1. Tap **Reports** on the *Side Navigation Bar*. Then tap the **Concierges** button.
2. In the *Concierge Report Options Dialog*, tap the **Start** and **End Date** dropdown list controls to select the date for the report. You can also tap the **Today** buttons to set your start and end dates for a report that covers just today.

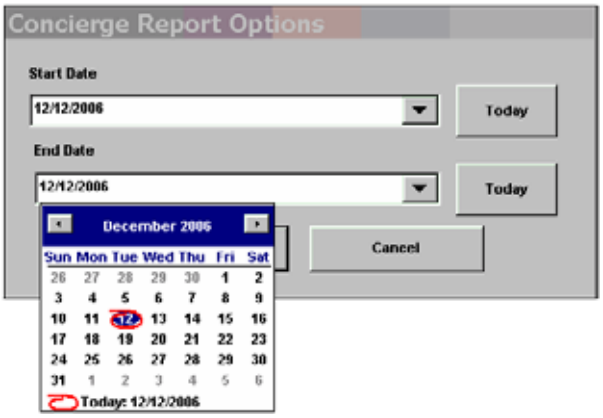


Figure 19-3: Concierge Report Options and Calendar Dialog

3. Tap the **Generate Report** button to generate the concierge report.

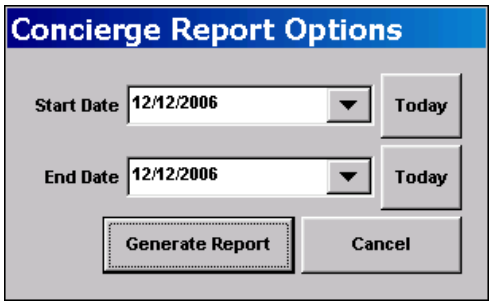


Figure 19-4: Concierge Report Options Dialog

The concierge report contains the following information for referred reservations:

- Hotel Name
- Concierge Name
- Hotel Phone #
- # Reservations
- # Covers
- # Cancellations
- # No Shows
- No Show Rate

Close of Shift Report

The close of shift report shows the numbers of walk-ins, cancellations, no-shows, total covers, and total tables seated over different time periods. To run a close of shift report:

1. Tap **Reports** on the *Side Navigation Bar*. Then tap the **Close of Shift** button.
2. In the *Close of Shift Report Options Dialog*, tap the desired shift for the report (only open shifts will be displayed).

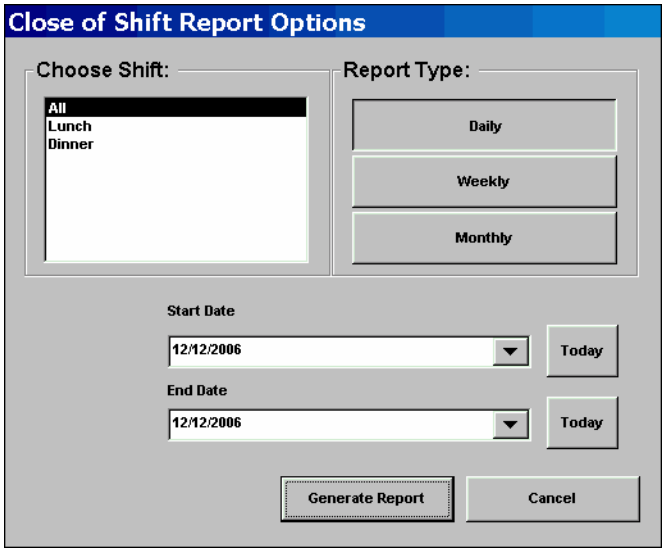


Figure 19-5: Close of Shift Report Options Dialog

3. Tap a report type (daily, weekly, or monthly) to group totals by day, week or month.
4. Tap the **Start and End Dates** dropdown list controls to select the date for the report. You can also tap the **Today** buttons to set your Start and End Dates for a report that covers just today.
5. Tap the **Generate Report** button.

The *Close of Shift Report* contains the following information:

- # of Walk-Ins
- # of Cancellations
- # of No Shows
- Total Covers
- Total Seated Covers
- Walk-In %
- No Show %
- Size of the Largest Party

Reservation, Cancellation, and No Show Reports

The reservation, cancellation, and no show reports generate a list of your reservations based on the status of the reservation.

Reservation Report

The reservation report generates a list of your reservations for one or more shifts (past, present, or future). You can filter the report to show reservations for specific types of reservations and/or specific types of guest (based on reservation and guest codes) - for example, report on birthday reservations made by VIPs. To run a reservation report:

1. Tap **Reports** on the *Side Navigation Bar*. Then tap the **Reservation & Cancellation** button.

2. In the *Reservation and Cancellation Report Options Dialog*, tap the **Reservations** button in the *Report Type* section to select the reservations report.

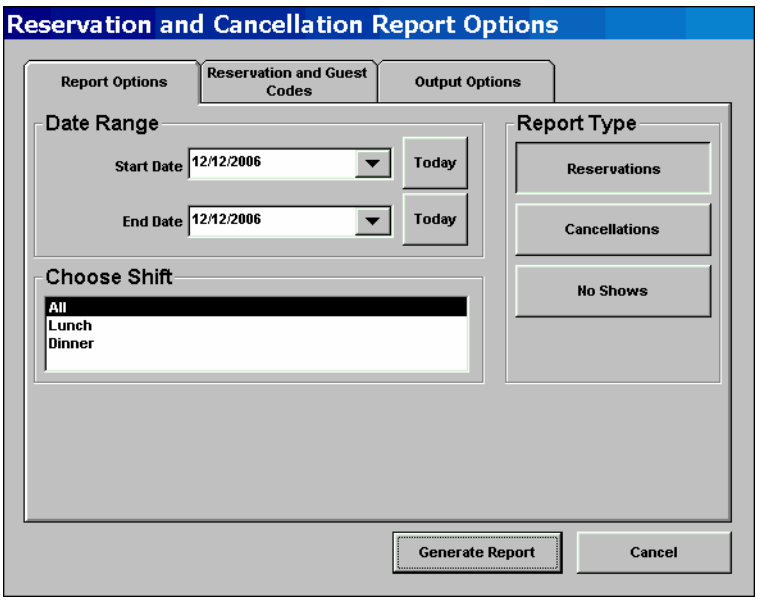


Figure 19-6: Reservation and Cancellations Report Options Dialog - Report Options Tab

3. Tap the **Start and End Dates** dropdown list controls to select the date for the report. You can also tap the **Today** buttons to set your start and end dates for a report that covers just today.
4. Tap the desired shift for the report (only open shifts will be displayed).
5. Tap the **Reservation and Guest Codes Tab** to see the next set of report options.

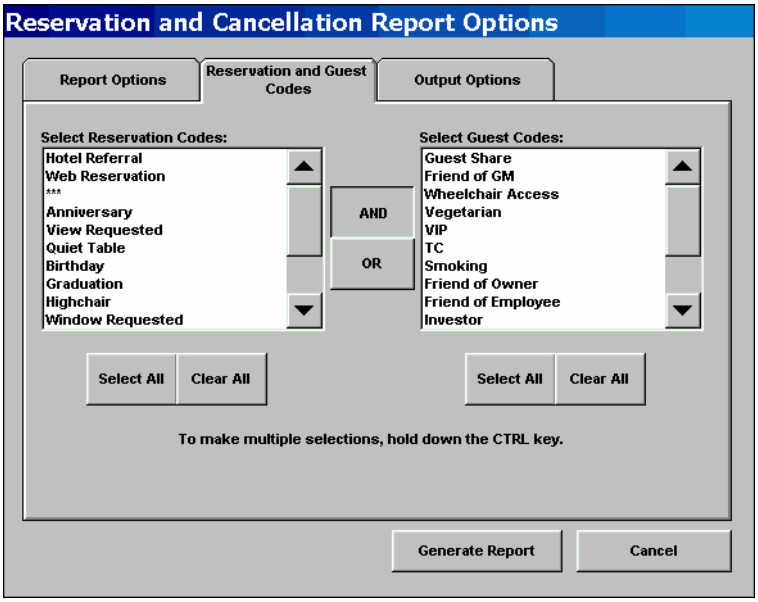


Figure 19-7: Reservation and Cancellations Report Options Dialog - Reservation and Guest Codes Tab

6. Filter the report by selecting the desired reservation and guest codes. To select multiple codes, hold down the **Ctrl** key on your keyboard and tap each code that you want to select.

7. Tap the **And** or **Or** button to use the desired combination of reservation and guest codes. For example, get reservations that have the Birthday reservation code AND were made by guests with the VIP guest code.
8. Tap the **Output Options Tab** to see the next set of report options.

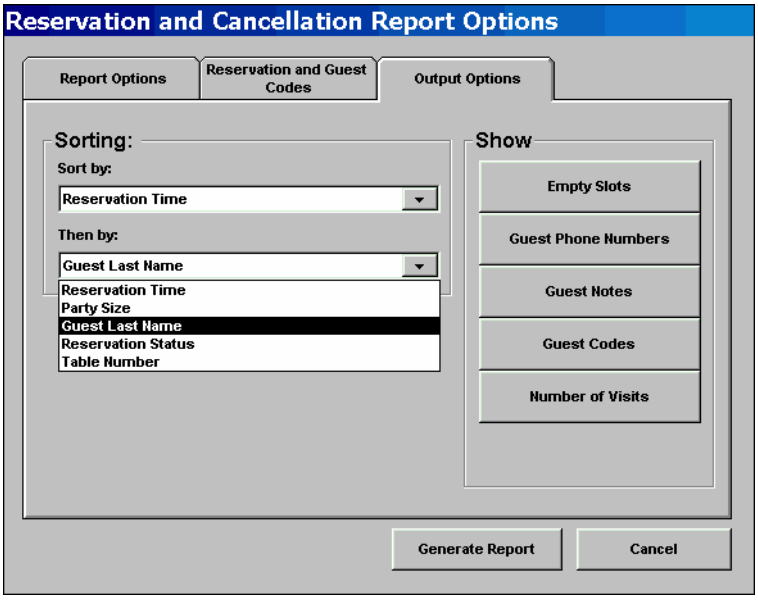


Figure 19-8: Reservation and Cancellations Report Options Dialog - Output Options Tab

9. Use the *Output Options Tab* to change the report sort order and which fields to display. The default sort order is to sort by reservation time and then by guest name within each reservation time.
10. To select fields for display, tap the field name that you want to display on the report (the button will look like it has been pressed in). The following fields can be displayed or hidden:
    - Empty Slots
    - Guest Phone Numbers
    - Guest Notes
    - Guest Codes
    - Number of Visits
11. Tap the **Generate Report** button to generate the reservation report. The reservation report contains the following information:
    - Shift
    - Date Range
    - Reservation Date
    - Reservation Time
    - Party Size
    - Table Number
    - Last Name
    - First Name
    - Status
    - Phone Number
    - Notes
    - Codes
    - Number of Visits
    - Date the reservation was made
    - Cover Count
    - POS Check ID *
    - Check Total *

* Guest Spend information can be selected as an output option only if POS Integration is activated.

Cancellation Report

The cancellation report generates a list of your reservations that have a status of *Cancelled*. You can filter the report to show cancellations for specific types of reservations and specific types of guests within a date range. To run the cancellation report:

1. Tap **Reports** on the *Side Navigation Bar*. Then tap the **Reservation & Cancellation** button.

2. In the *Reservation and Cancellation Report Options Dialog*, tap the **Cancellations** button in the *Report Type section* to select the cancellations report.

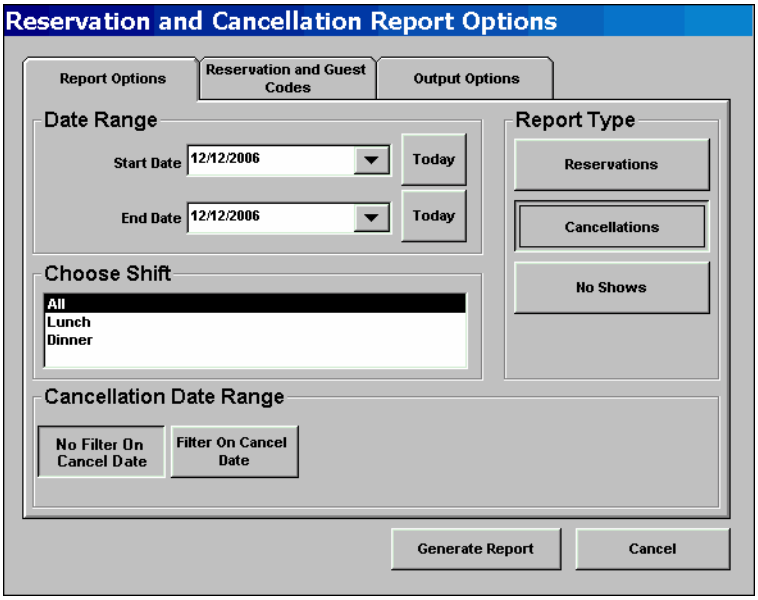


Figure 19-9: Reservation and Cancellations Report Options Dialog - Report Options Tab

3. Tap the **Start and End Dates** dropdown list controls to select the date for the report. You can also tap the **Today** buttons to set your start and end dates for a report that covers just today.
4. Tap the desired shift for the report (only open shifts will be displayed).
5. If you wish to filter by the date that the reservation was cancelled, tap the **Filter on Cancel Date** button and select your date range.

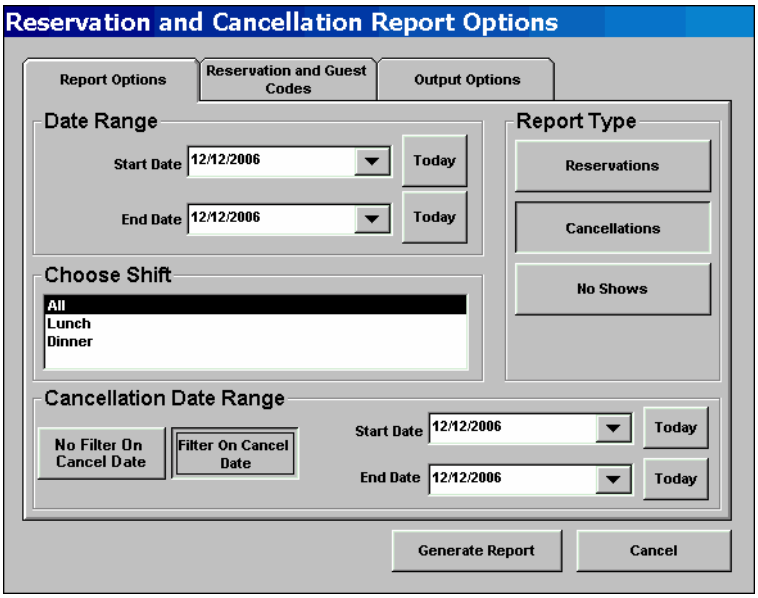


Figure 19-10: Reservation and Cancellations Report Options Dialog - Filtering by Cancellation Date

6. Tap the **Reservation and Guest Codes Tab** to see the next set of report options.

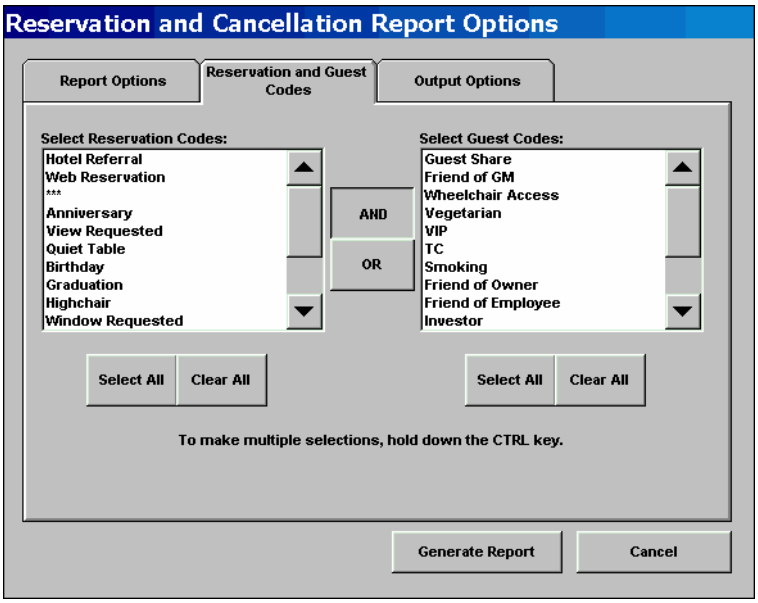


Figure 19-11: Reservation and Cancellations Report Options Dialog - Reservation and Guest Codes Tab

7. Filter the report by selecting the desired reservation and guest codes. To select multiple codes, hold down the **Ctrl** key on your keyboard and tap each code that you want to select.
8. Tap the **And** or **Or** button to use the desired combination of reservation and guest codes.
9. Tap the **Output Options Tab** to see the next set of report options.

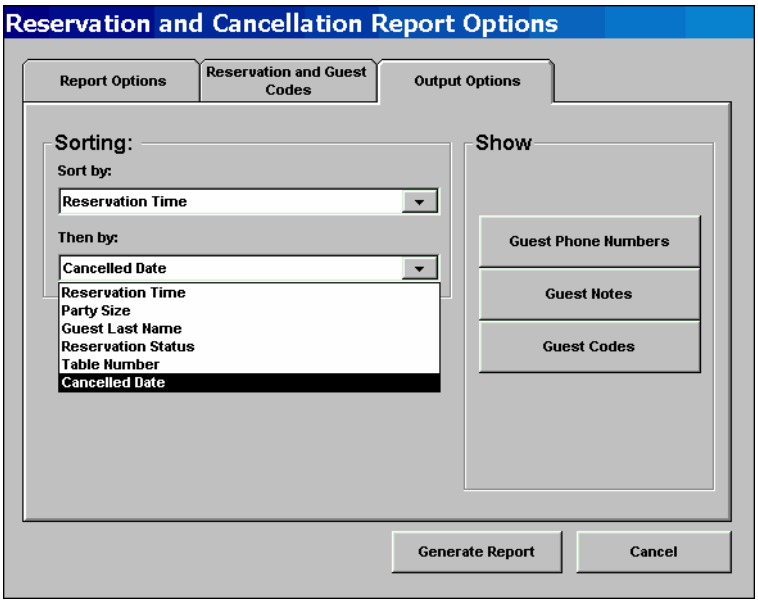


Figure 19-12: Reservation and Cancellations Report Options Dialog - Output Options Tab

10. Use the *Output Options Tab* to change the report sort order and which fields to display. The default sort order is to sort by reservation time and then by guest name within each reservation time.

11. To select fields for display, tap the field name that you want to display on the report (the button will look like it has been pressed in). The following fields can be displayed or hidden:
    - Guest Phone Numbers
    - Guest Notes
    - Guest Codes
12. Tap the **Generate Report** button to generate the cancellation report. The cancellation report contains the following information:
    - Shift
    - Date Range
    - Reservation Date
    - Cover Count
    - Reservation Time
    - Party Size
    - Table Number
    - Last Name
    - First Name
    - Phone Number
    - Notes
    - Codes
    - Date the reservation was made
    - Date and time of cancellation

No Show Report

The no show report generates a list of your reservations that have a no show status. You can filter the report to show no show reservations for specific types of reservations and specific types of guests within a date range. To run the no show report:

1. Tap **Reports** on the *Side Navigation Bar*. Then tap the **Reservation & Cancellation** button.
2. In the *Reservation and Cancellation Report Options Dialog*, tap the **No Shows** button in the *Report Type* section.

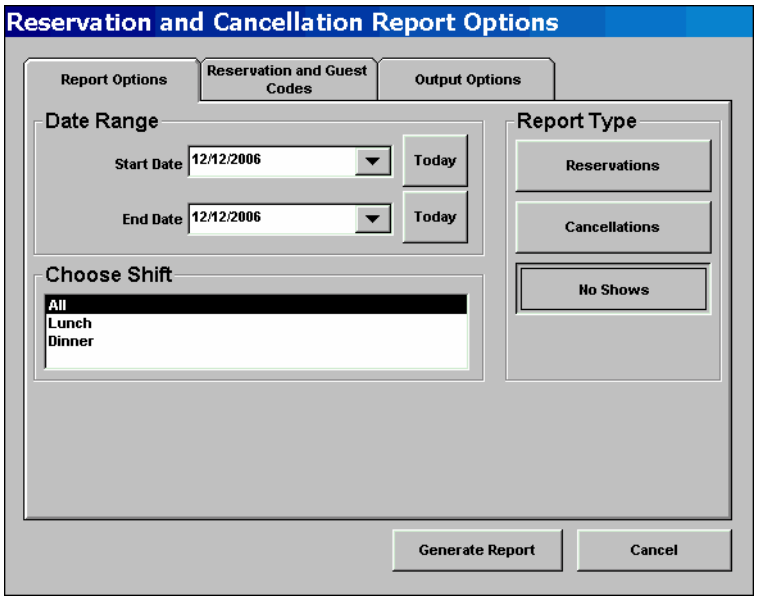


Figure 19-13: Reservation and Cancellations Report Options Dialog - Report Options Tab

3. Tap the **Start and End Dates** dropdown list controls to select the date for the report. You can also tap the **Today** buttons to set your start and end dates for a report that covers just today.
4. Tap the desired shift for the report (only open shifts will be displayed).

5. Tap the **Reservation and Guest Codes Tab** to see the next set of report options.

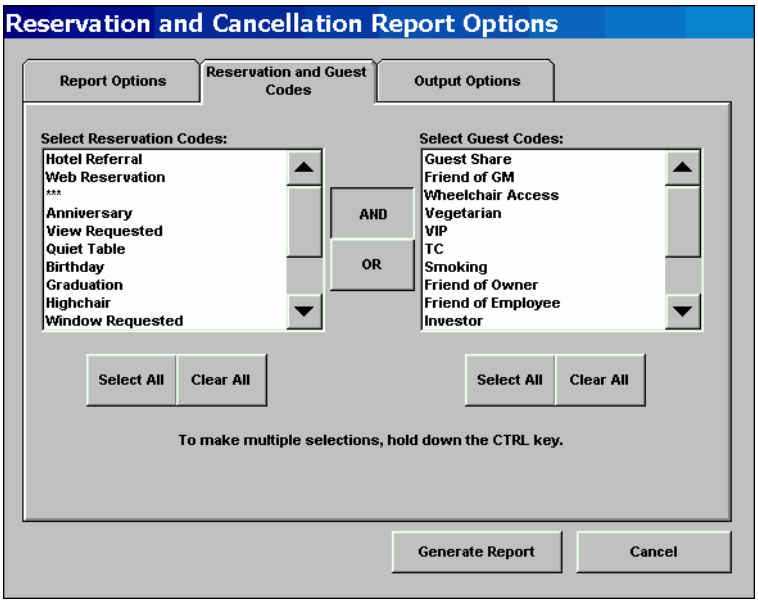


Figure 19-14: Reservation and Cancellations Report Options Dialog - Reservation and Guest Codes Tab

6. Filter the report by selecting the desired reservation and guest codes. To select multiple codes, hold down the **Ctrl** key on your keyboard and tap each code that you want to select.
7. Tap the **And** or **Or** button to use the desired combination of reservation and guest codes.
8. Tap the **Output Options Tab** to see the next set of report options.

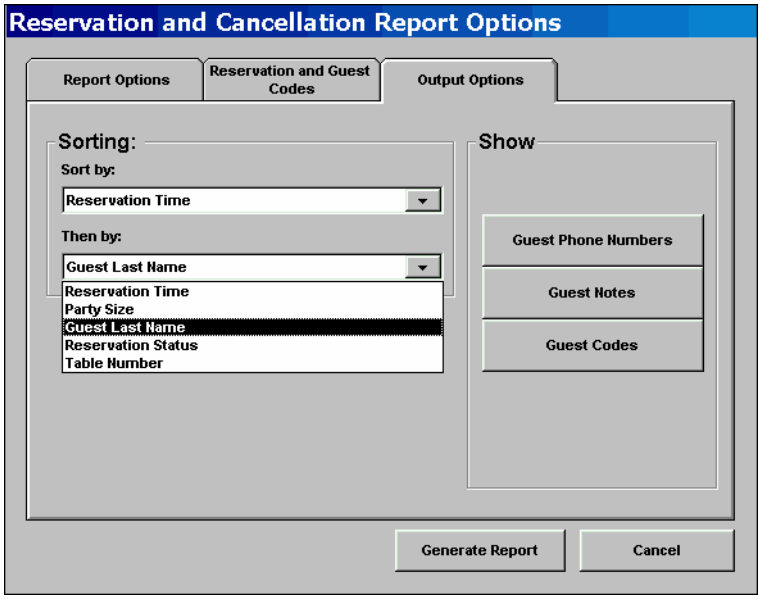


Figure 19-15: Reservation and Cancellations Report Options Dialog - Output Options Tab

9. Use the **Output Options Tab** to change the report sort order and which fields to display. The default sort order is to sort by reservation time and then by guest name within each reservation time.

10. To select fields for display, tap the field name that you want to display on the report (the button will look like it has been pressed in). The following fields can be displayed or hidden:
    - Guest Phone Numbers
    - Guest Notes
    - Guest Codes
11. Tap the **Generate Report** button to generate the no show report. The no show report contains the following information:
    - Shift
    - Date Range
    - Cover Count
    - Reservation Date
    - Reservation Time
    - Party Size
    - Table Number
    - Last Name
    - First Name
    - Phone Number
    - Notes
    - Codes
    - Date the reservation was made

Guest Report

The guest report generates a list of guests and can be filtered based on their reservations, address, or code information. To run a guest report:

1. Tap **Reports** on the *Side Navigation Bar*. Then tap the **Guest** button.
2. In the *Guest Report Options Dialog*, tap the **Show All Guests** button to generate an unfiltered report. Depending on the number of guests in the system, an unfiltered report may take several minutes to generate.

If you want to access all guest records, it is faster to use the guest export feature to export all your guests out of the OpenTable system. The export file will also be easier to import into another software program like Microsoft Excel or Access.

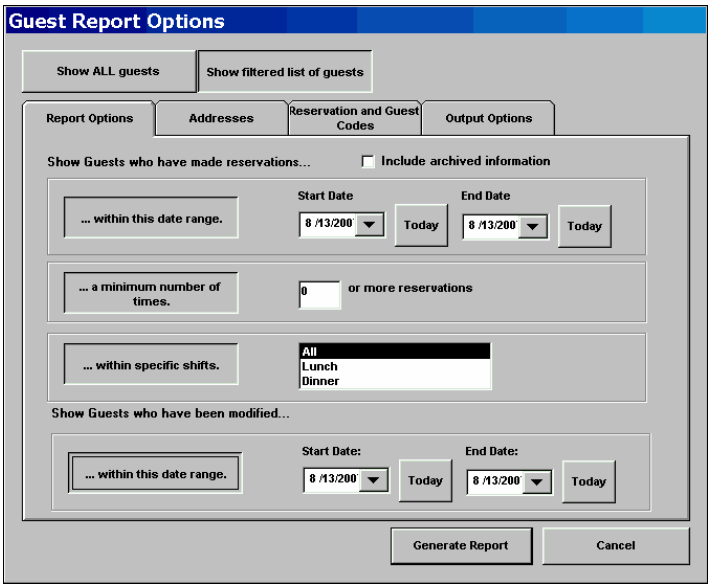


Figure 19-16: Guest Report Options Dialog - Report Options Tab

3. You can also tap the **Show Filtered List of Guests** button to generate a filtered report - all the report option tabs will be activated and will allow you to configure the options for your report.
4. Tap the **Report Options Tab** and tap each button to see the various configuration options. You can create a guest report for guests that dined within a specific date range, dined a minimum number of times, and dined during a specific shift. You can also include guests who have been modified within a

specific date range. Tap the box next to *Include archived information* to include archived guest data. The system will warn you if the report will access archived data for the report.

5. Tap the **Addresses Tab** to configure the report to filter by state, city, zip / postal code or area code (US and Canada only). Note that you can only filter addresses using one of these four criteria.

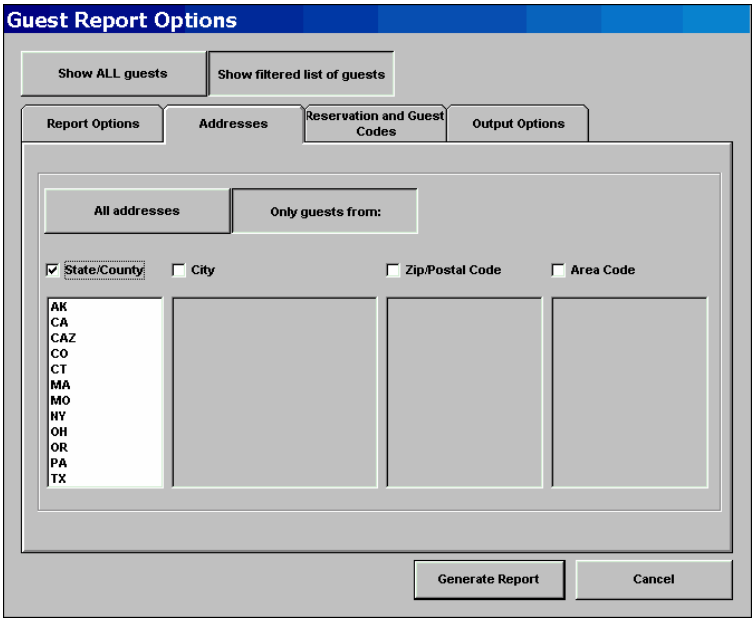


Figure 19-17: Guest Report Options Dialog - Addresses Tab

6. Check the desired address option (state, city, zip / postal code, and area code) to display a list of values for the option. For example, checking the state option will display a list of states that have been captured in guest addresses.
7. Press the **Ctrl** key on the keyboard and tap each state that you want to select. When the system generates the report, it will only include guests that live in the selected states.

8. Tap the **Reservation and Guest Codes Tab** to see the next set of report options.

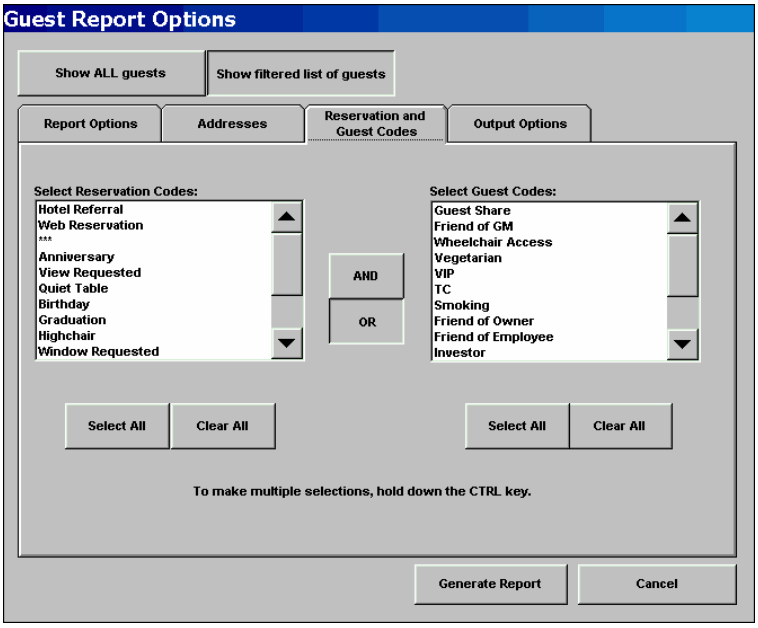


Figure 19-18: Guest Report Options Dialog - Reservation and Guest Codes Tab

9. On this tab, you can filter the report by selecting the desired reservation and guest codes. To select multiple codes, hold down the **Ctrl** key on your keyboard and tap each code that you want to select.
10. Tap the **And** or **Or** button to use the desired combination of reservation and guest codes. For example, report on guests with the VIP guest code.
11. Tap the **Output Options Tab** to see the next set of report options.

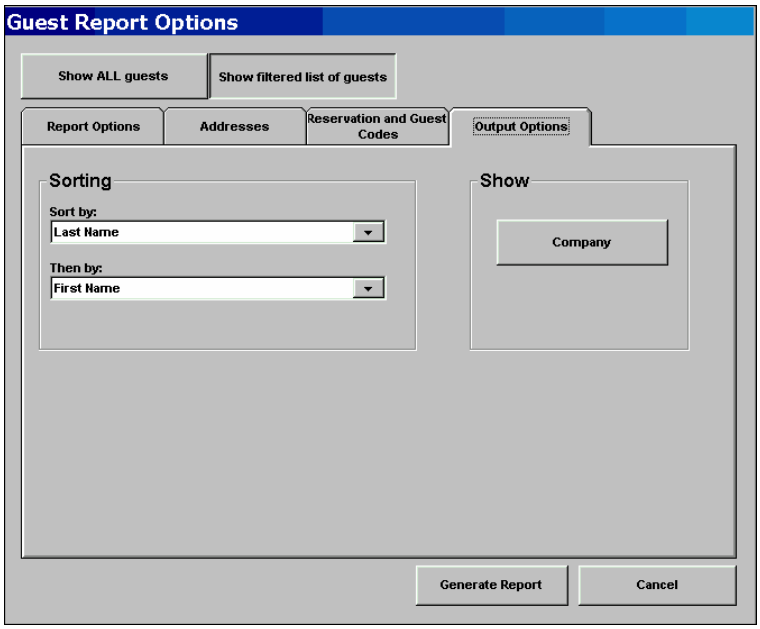


Figure 19-19: Guest Report Options Dialog - Output Options Tab

12. You can use this tab to change the sort order of the guest report. Tap the dropdown list controls to select the desired fields to sort by.

13. On this tab, you can also select the *Company* field to display on the report. Tap the button to display the field on the report (the button will look like it has been pressed in).
14. Tap the **Generate Report** button to generate your guest report.

The guest report contains the following information:

- Last Name
- First Name
- Address
- Company (optional)
- City
- State
- Zip / Postal Code
- Mail Opt-In Flag
- E-Mail Address
- E-Mail Opt-In Flag
- Phone Number
- Date of Last Reservation
- # of Reservations
- # of Cancellations
- # of No Shows
- Guest Spend (optional) *

* Guest spend information can be selected and contains data only if POS Integration is activated.

The mail and E-Mail opt-in columns indicate the guest's preference on whether or not they want to be contacted by mail or by E-Mail. Note that opting out of E-Mail will exclude a guest from receiving Marketing E-Mails. Guests will still receive reservation E-Mails (reservation confirmations, changes, and cancellations).

Cover Count Report

The cover count report provides a snapshot of the covers flow for a specific shift. There are two versions of the cover count report. The first version of the cover count report is formatted with time slots along the top of the page and the second version is formatted with time slots along the left side of the page.

Cover Count Report - Top Navigation Bar

To generate the first version of the cover count report:

1. Navigate to the shift and date using the *Shift* and *Calendar* buttons on the *Top Navigation Bar*.

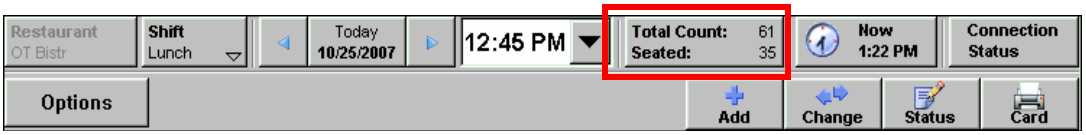


Figure 19-20: Top Navigation Bar

2. Tap the **Total Count / Seated Count** button on the *Top Navigation Bar*. The system displays the cover count report for the selected shift in a separate dialog. The report displays color coded cover counts for individual reservations by time slot and running subtotals. The colors display the different types of covers:
   - Expected covers (expected but not yet arrived)
   - In-House covers (parties that are partially arrived, arrived, seated, or in the middle of service)

- Completed covers (parties that have finished dining)

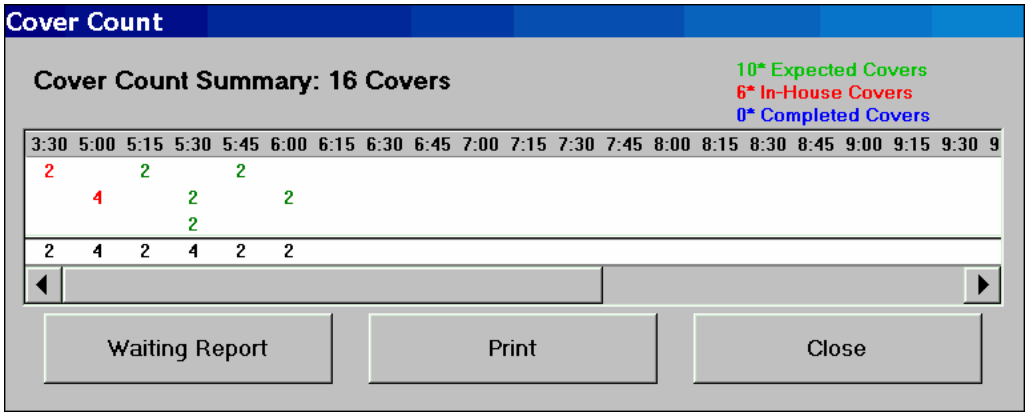

Cover Count
Cover Count Summary: 16 Covers
10* Expected Covers
6* In-House Covers
0* Completed Covers
3:30 5:00 5:15 5:30 5:45 6:00 6:15 6:30 6:45 7:00 7:15 7:30 7:45 8:00 8:15 8:30 8:45 9:00 9:15 9:30 9
2 2 2
4 2 2
2
2 4 2 4 2 2
Waiting Report
Print
Close

Figure 19-21: Cover Count Report

3. Tap the **Print** button to print a copy of the report.
4. Tap the **Waiting Report** button to generate a report of the *Partially Arrived* or *All Arrived* parties that are waiting to be seated.

Cover Count Report - Reports View

The second version of the cover count report displays time slots along the left side of the report and also shows cover counts for each reservation by time slot as well as subtotals by time slot.

To generate a cover count report:

1. Tap **Reports** on the *Side Navigation Bar*. Then tap the **Cover Count** button.
2. In the *Cover Count Report Options Dialog,* tap the **Shift Date** dropdown list control to select the date for the report.

Figure 19-22: Cover Count Report Options Dialog

3. Tap the desired shift for the report (only open shifts will be displayed).
4. Tap the **Generate Report** button to create the cover count report.

The cover count report contains the following information:

- Reservation Date
- Shift
- Time slot
- Total cover count by time slot
- Cover count by time slot by reservation

Guest Cards

Guest cards are the report-style version of chit printouts. The guest cards report is designed to print reservation and guest details in a small 2" x 3" area on 8 ½" by 11" or A4 paper. Because the print area is limited to 2" x 3", all of the selected information may not fit and some information may be truncated.

You can configure the system to print ALL (reservation and guest) notes and codes on the guest card report by checking the **Expand to Show All Notes and Codes Option** in the *Admin View* I *Floor Management / Chits/Cards Tab.* The card printouts will no longer print in the 2" x 3" space but will print all requested information for a reservation and guest.

You can configure both the guest cards and the chit settings in the *Admin View / Floor Management / Chits/Cards Tab.*

Generating Guest Cards

To generate guest cards:

1. Tap **Reports** on the *Side Navigation Bar*. Then, tap the **Guest Cards** button.
2. In the *Guest Card Options Dialog*, tap the **Start Date** and **End Date** dropdown list controls to select the date for the report. You can also tap the **Today** buttons to set your start and end dates for a report that covers just today.

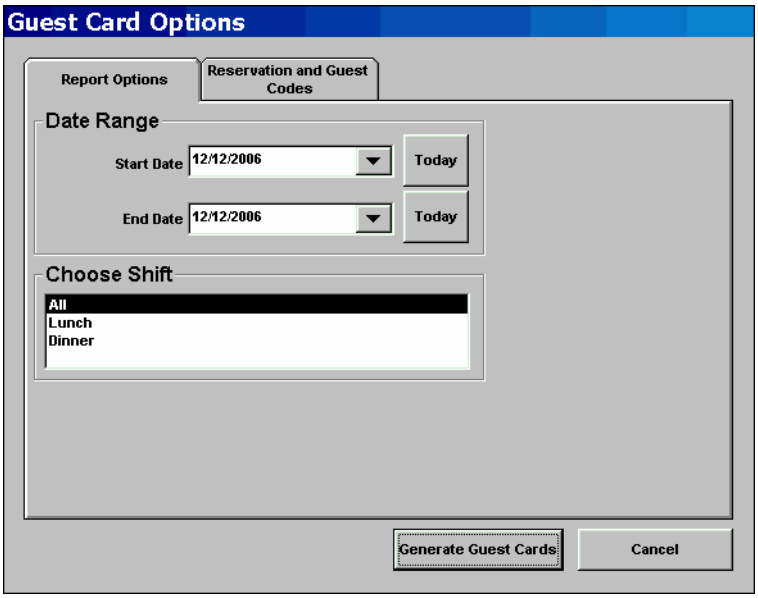


Figure 19-23: Guest Card Report Options Dialog

3. Tap the desired shift for the report (only open shifts will be displayed).

4. Tap the **Reservation and Guest Codes Tab** to see the next set of report options.

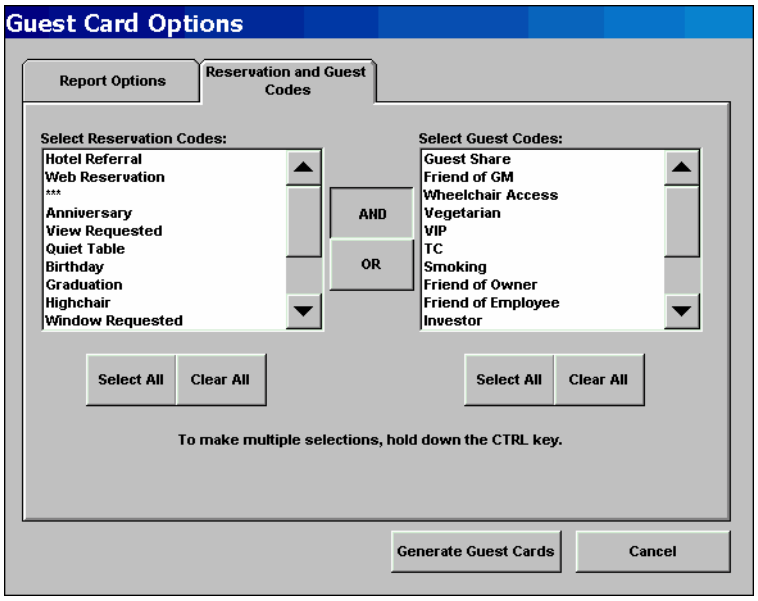


Figure 19-24: Guest Card Reservation and Guest Codes Tab

5. Filter the report by selecting the desired reservation and guest codes. To select multiple codes, hold down the **Ctrl** key on your keyboard and tap each code that you want to select.
6. Tap the **And** or **Or** button to use the desired combination of reservation and guest codes.
7. Tap the **Generate Guest Cards** button to generate the guest cards report.

The guest card report contains the following information:

- Name
- Reservation Date
- Reservation Time
- Party Size
- Table Number
- Arrival Time
- Seated Time
- Server Name
- Phone Number
- Reservation / Guest Notes
- Reservation / Guest Codes
- Cancellations
- No Shows
- Last Reservation
- Reservation Count
- Member ID (if applicable)

In-House Waitlist Report

The *In-House Waitlist Report* generates a list of waitlist entries for one or more shifts (past, present, or future). You can filter the report to show waitlist entries with specific status values and/or specific types of guests - for example, report on seated "VIP" waitlist parties.

To run the *In-House Waitlist Report:*

1. Tap the **Reports** button on the *Side Navigation Bar*. Then tap the **Waitlist** button.

You can also run the In-House Waitlist Report directly from the In-House Waitlist View by tapping the Waitlist Report button in the lower right portion of the view.

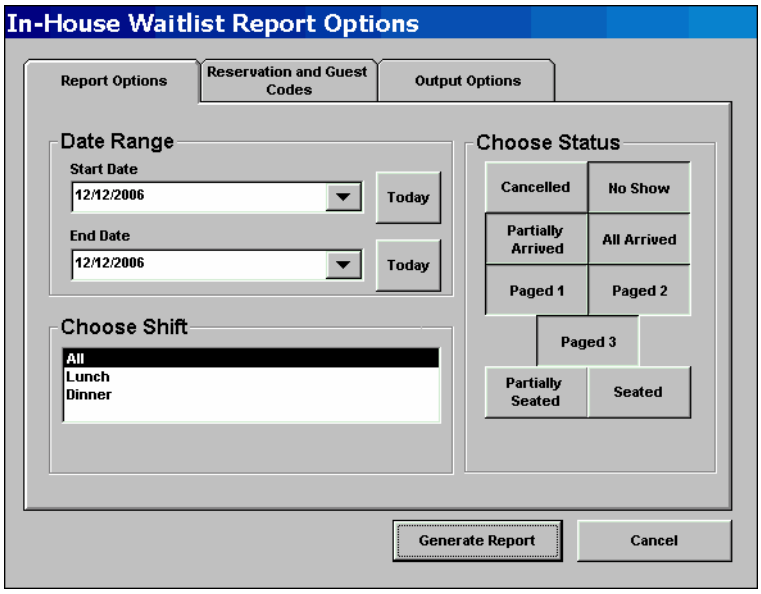


Figure 19-25: In-House Waitlist Report Options Dialog

2. The system displays the *In-House Waitlist Report Options Dialog*. Tap the **Start Date** and **End Date** dropdown list controls to select the date for the report. You can also tap the **Today** buttons to set your start date and end date for a report that covers just today.
3. Tap the desired shift for the report (only open shifts will be displayed).
4. Tap the desired status values for the report. The status values selected by default are *No Show, Partially Arrived, All Arrived, Paged 1, Paged 2, and Paged 3*.
5. Tap the **Reservation and Guest Codes Tab** to see the next set of options.

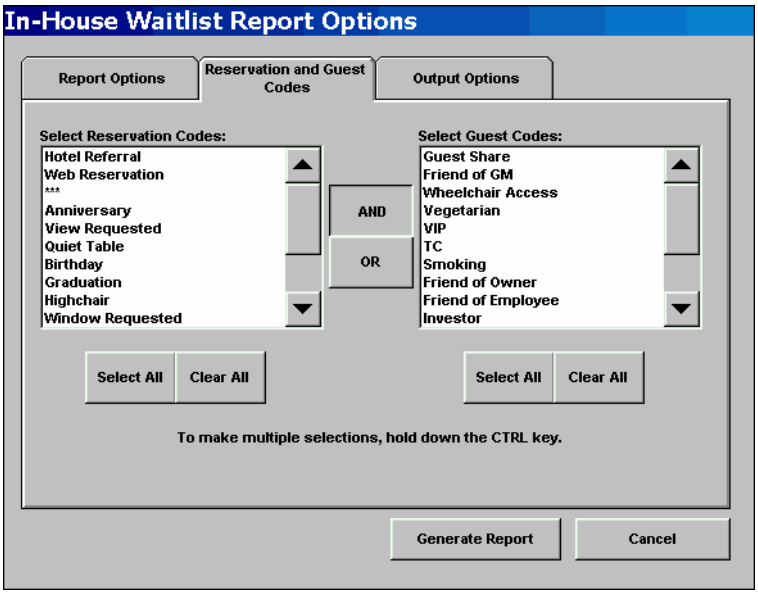


Figure 19-26: In-House Waitlist Reservation and Guest Codes Tab

6. Filter the report by selecting the desired reservation and guest codes. To select multiple codes, hold down the **Ctrl** key on your keyboard and tap each code that you want to select.
7. Tap the **And** or **Or** button to use the desired combination of reservation and guest codes. For example, get waitlist entries that have the Birthday reservation code AND were for guests with the "VIP" guest code.
8. Tap the **Output Options Tab** to see the next set of report options.

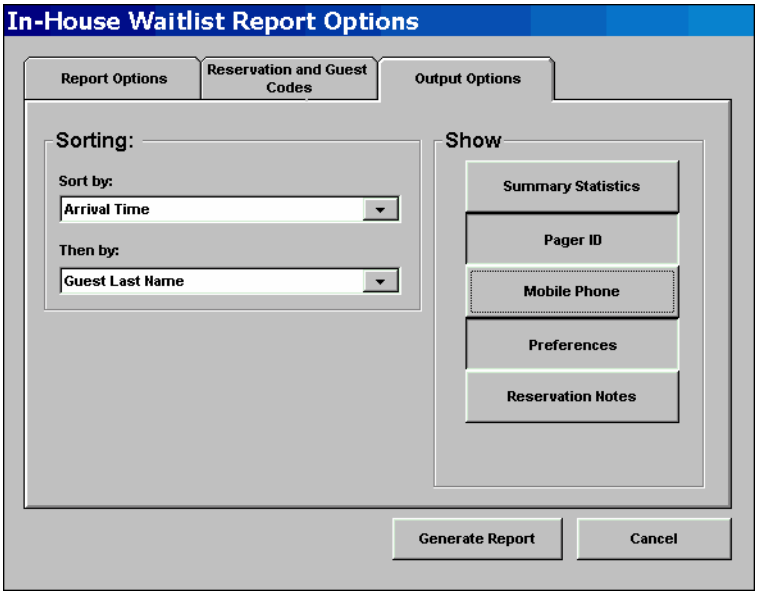


Figure 19-27: In-House Waitlist Output Options Tab

9. Tap the **Output Options Tab** to change the report sort order and the display of fields. The default sort order is to sort by *Arrival Time* and then by *Guest Last Name*.
10. To select fields for display, tap the field name that you want to display on the report (the button will look like it has been pressed in). The following information can be displayed or hidden:
    - Summary Statistics
    - Pager ID
    - Mobile Phone
    - Preferences
    - Reservation Notes

11. Tap **Generate Report** to generate the *In-House Waitlist Report.*

The *In-House Waitlist Report* has three parts: report header, report detail, and report footer summary statistics.

The report header contains the following information:

- Shift
- Report Date Range
- Sorted By

The report detail contains the following information:

- Guest's Last Name
- Guest's First Name
- # (Party Size)
- Pager (Pager ID)
- Arrival (Time that guest arrived)
- Quoted (Time that guest was quoted)
- Status
- Wait (Wait time in minutes)
- Seated (When guest was seated)
- +/- (time over/under quoted time)
- Preferences
- Notes (Reservation)

The report footer summary contains the following information:

- No Shows (# of No Show parties)
- Cancellations (# of Cancelled parties)
- Net Entries (Waitlist Parties net of no shows and cancellations)
- Net Covers (Waitlist Covers net of no shows and cancellations)
- Avg Seated vs. Quoted (average amount of time over/under quoted time)
- Avg Wait Time (average amount of time quoted to waiting guests)

Historical waitlist information is maintained for eight days. For example, if today is Friday, you can run the waitlist report for last Friday. Any waitlist information older than eight days is purged from the system and will not appear in the In-House waitlist report.

Notes on the In-House Waitlist Report

- You can cancel a waitlist party if a waiting guest decides to leave and you want to remove them from the waitlist. Changing the status of a waiting party to *Cancelled* removes the party from the *In-House Waitlist View* but you can still report on them if you select the *Cancelled* status.
- You can mark a waiting party with the *No Show* status if the party does not show up to be seated after repeated attempts to page or call them.
- Summary statistics and averages are calculated based on the contents of the report. To see summary statistics for the whole shift, select the specific date, shift, and all the statuses except for the *No Show* status.

Special Occasions Report

Use the special occasions report to report on guest birthdays and anniversaries that you have captured in the *Special Occasions* fields in the *Guests View*.

To run a special occasions report:

1. Tap **Reports** on the *Side Navigation Bar*. Then tap the **Special Occasions** button.
2. In the *Guest Special Occasions Options Dialog*, tap the **Show All Guests** button to generate an unfiltered report. Depending on the number of guests that you have in the system, an unfiltered report may take several minutes to generate.

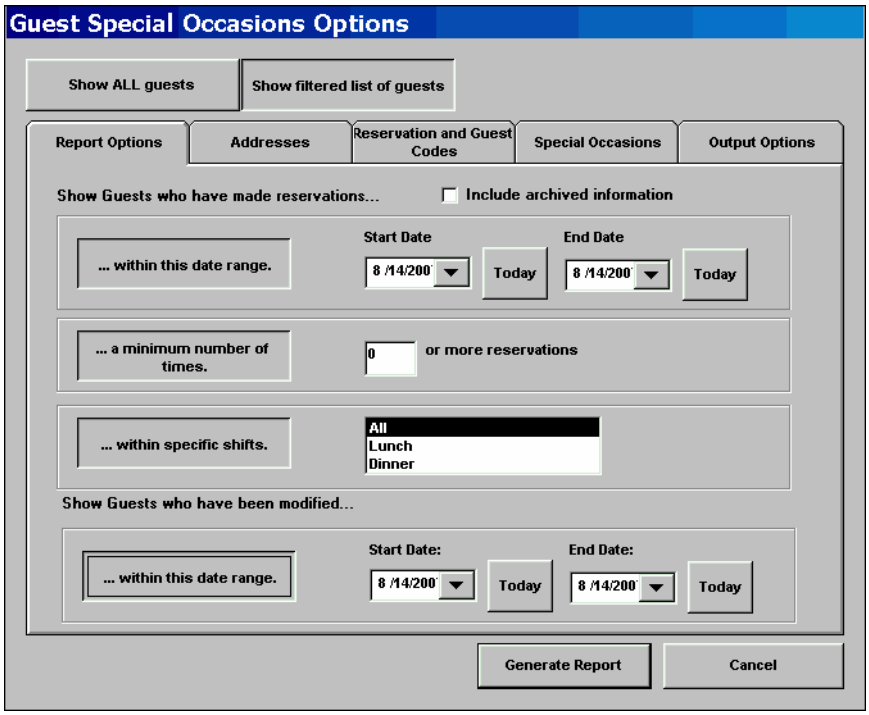


Figure 19-28: Guest Special Occasions Report Options Dialog

3. You can also tap the **Show Filtered List of Guests** button to generate a filtered report - all the report option tabs will be activated and will allow you to configure the options for your report.
4. Tap the **Report Options Tab** and tap each button to see the configuration options. You can create a special occasions report for guests that dined within a specific date range, dined a minimum number of times, and dined during a specific shift. You can also include guests who have been modified within a date range. Tap the box next to *Include archived information* to include archived guest data. The system will warn you if the report will access archived data for the report.

5. Tap the **Addresses Tab** to configure the report to filter by state, city, zip / postal code or area code (US and Canada only). Note that you can only filter addresses using one of these four criteria.

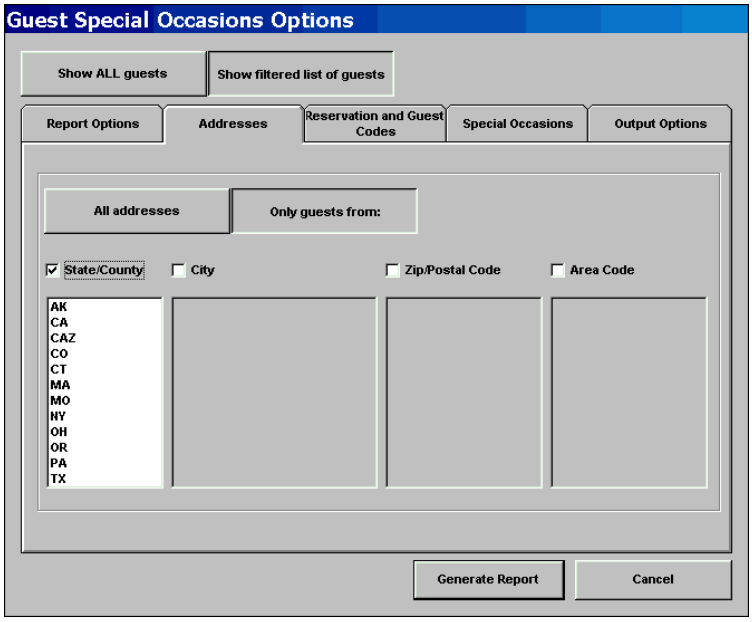


Figure 19-29: Guest Special Occasions Addresses Tab

6. Check the desired address option (state, city, zip / postal code, and area code) to display a list of values for the option. For example, checking the state option will display a list of states that have been captured in guest addresses.
7. Press the **Ctrl** key on the keyboard and tap each state that you want to select. When the system generates the report, it will only include guests that live in the selected states.

8. Tap the **Reservation and Guest Codes Tab** to see the next set of options.

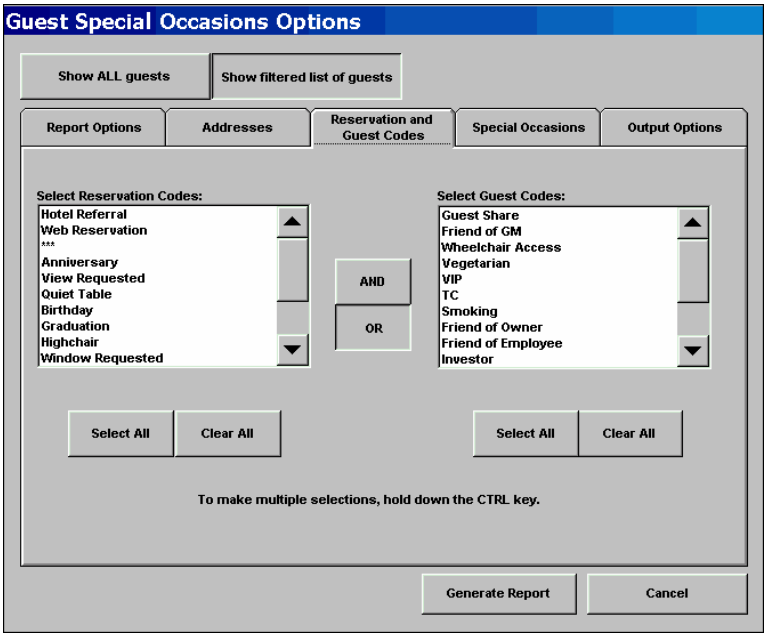


Figure 19-30: Guest Special Occasions Reservation and Guest Codes Tab

9. On this tab, you can filter the report by selecting the desired reservation and guest codes. To select multiple codes, hold down the **Ctrl** key on your keyboard and tap each code that you want to select.
10. Tap the **And** or **Or** button to use the desired combination of codes. For example, get special occasions for guests with the VIP guest code.
11. Tap the **Special Occasions Tab** to see the next set of report options.

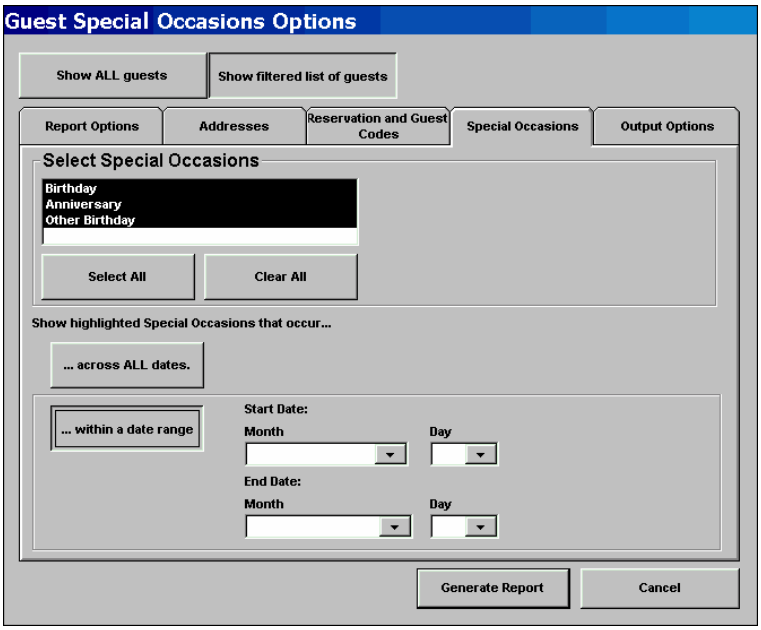


Figure 19-31: Guest Special Occasions - Special Occasions Tab

12. Select the *Special Occasion* type to report on. To select all types, tap the **Select All** button.

13. Use the dropdown list for *Month and Day* to set a date range for when the special occasion occurs.
14. Tap the **Output Options Tab** to see the next set of report options.

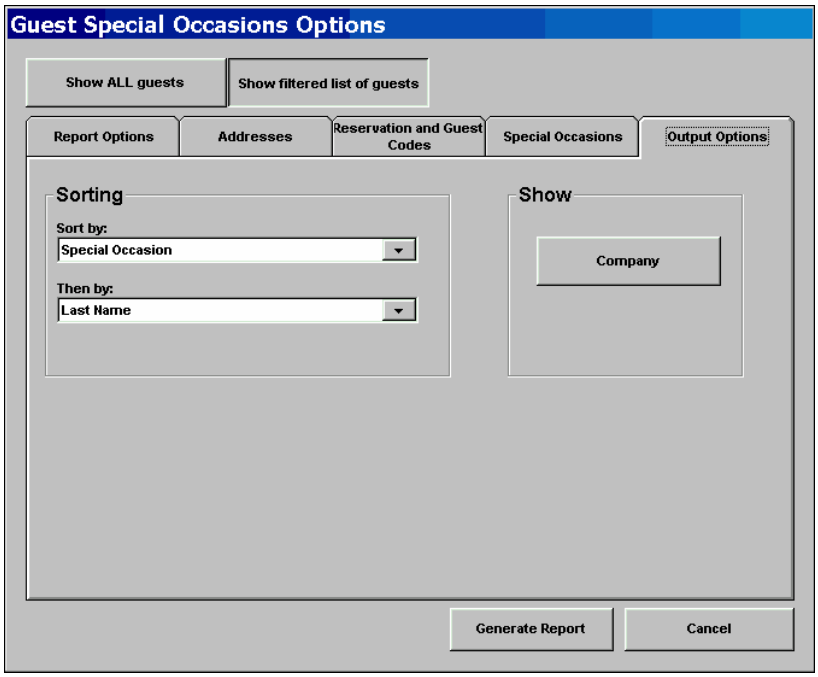


Figure 19-32: Guest Special Occasions Output Options Tab

15. You can use this tab to change the sort order of the special occasions report. Tap the dropdown list controls to select the desired fields to sort by.
16. On this tab, you can also select the *Company* field to display on the report. Tap the **Company** button to display it on the report (the button will look like it has been pressed in).
17. Tap the **Generate Report** button to generate the special occasions report.

The special occasions report contains the following fields:

- Occasion Type
- Occasion Date
- Last Name
- First Name
- Address
- City
- State
- Zip / Postal Code
- Company (optional)
- E-Mail Address
- Phone Number

Viewing Reports

After tapping the **Generate Report** button to create your report, the system displays the report on the screen with a toolbar above the report pane. Use the toolbar to perform basic functions on the report, including paging forward/backward, printing, and exporting.

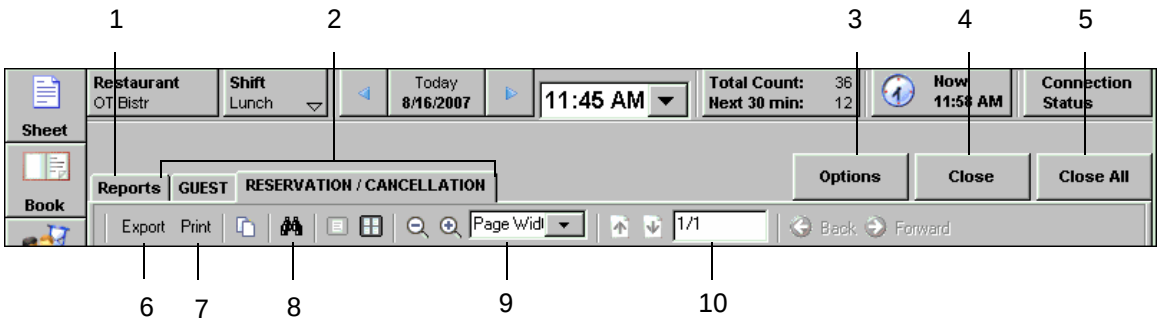


Figure 19-33: Report Toolbar

1	Reports Tab	Display the Reports menu	6	Export	Export the report output
2	Open Reports Tab	Displays all open reports, one on each tab (maximum of four)	7	Print	Print the report output
3	Options	Change report options	8	Find	Search for a character or word
4	Close	Close the selected report	9	Display Page Size	Change the magnification of the report display
5	Close All	Close all open reports	10	Page Up/Down	Go the previous or next report page

Working with Reports

- You can view up to four different reports at once with each report displayed on a different tab. To generate another report, tap the **Reports Tab** and select the new report by tapping the appropriate button.
- While viewing a report, tap the **Options** button (3) to change the report options.
- Moving to another view in the *OpenTable* system will automatically close all open reports.

Printing and Exporting Reports

Printing a Report

While viewing a report, tap the **Print** button (7) to print to an installed printer.

Exporting a Report

The export feature in any report lets you export the report data to different document formats. Supported formats include Microsoft Excel, Adobe Acrobat, Rich Text format, Text format, and HTML format. To export, simply tap the **Export** button (6). Choose a format and file name to export the report.

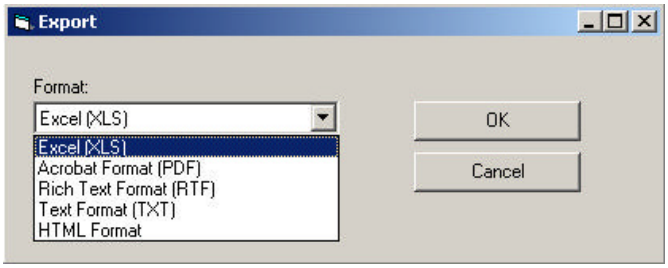


Figure 19-34: Report Export Dialog

Exporting to Microsoft Excel is not supported for Japan Installations.

To export your entire guest database, use the guest export function on the Reports View. The guest export will generate the list faster and will be easier to import into another software package like Microsoft Excel or Access. For more information, refer to "Guest Export" *on page 223.*

Marketing E-Mails

You can use the E-Mail feature to send Marketing E-Mails to all guests that have an E-Mail address in the system. You can also target specific guests for E-Mail marketing campaigns based on guest codes and other guest information, or you can send an E-Mail to just one guest.

In order for the E-Mail feature to function properly, you must:

- Ensure that you are connected to the web.
- Enter valid E-Mail gateway configuration settings, including a restaurant E-Mail address in the *Admin View | E-Mail Settings Area.* All E-Mail replies to Marketing and reservation reminder E-Mails will be sent to the restaurant E-Mail address.

Creating an E-Mail Distribution List

To create an E-Mail distribution list:

1. Tap **Reports** on the *Side Navigation Bar.* Then tap the **E-Mail** button.

2. The *Edit Marketing E-Mail Dialog* is displayed.

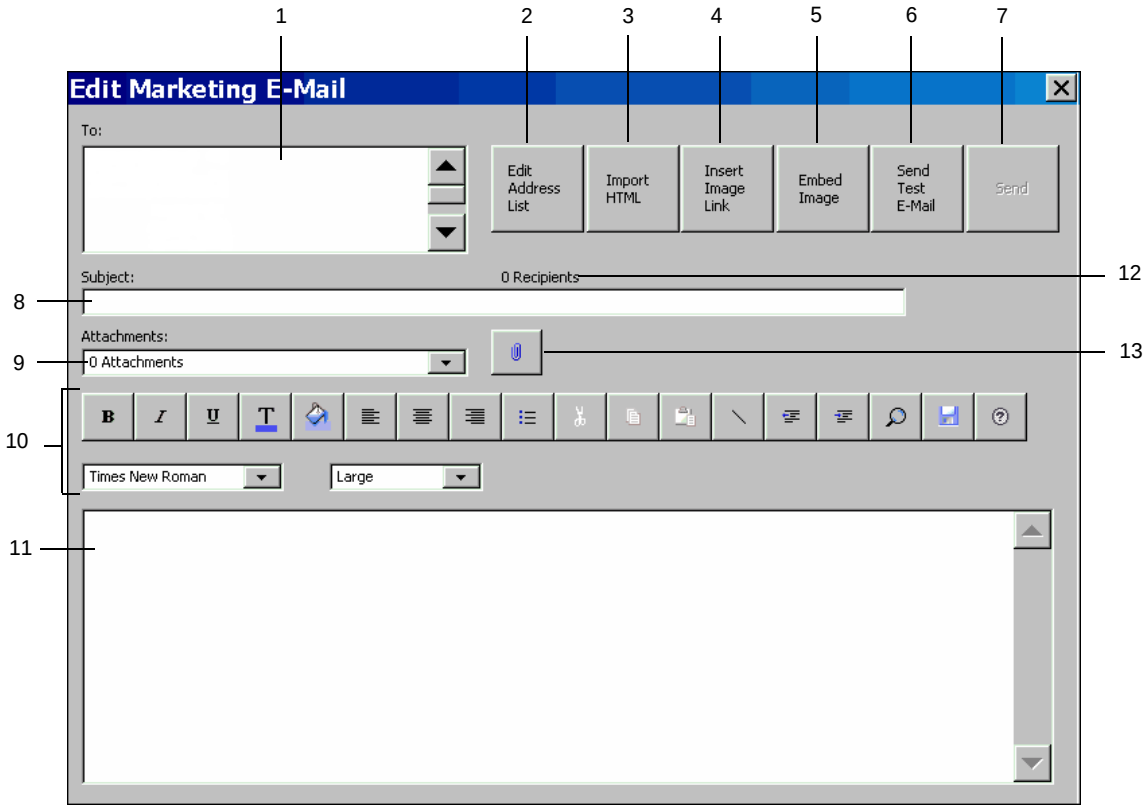


Figure 19-35: Edit Marketing E-Mail Dialog

1	To:	E-Mail distribution list	8	Subject	Subject of the E-Mail
2	Edit Address List	Edit the distribution list	9	Attachments	Lists any files attached to the E-Mail
3	Import HTML	Import HTML E-Mail file created previously	10	Editing Toolbar	Various buttons can be used to format the E-Mail body, add images, save the E-Mail body, etc.
4	Insert Image Link	Insert a link in your E-Mail to an image located on a public web server	11	E-Mail Body	Body of the E-Mail containing text, images, image links, etc.
5	Embed Image	Embed an image directly into your E-Mail	12	# of Recipients	Lists the total # of recipients in the E-Mail distribution list
6	Send Test E-Mail	Send E-Mail to one or more test E-Mail account	13	Attach button	Launches the Edit Attachment List dialog for adding attachments
7	Send	Send Marketing E-Mail			

3. Tap the **Edit Address List** (2) button to create the E-Mail address list.

4. In the *Edit Address List Dialog*, tap the **Add from DB...** button.

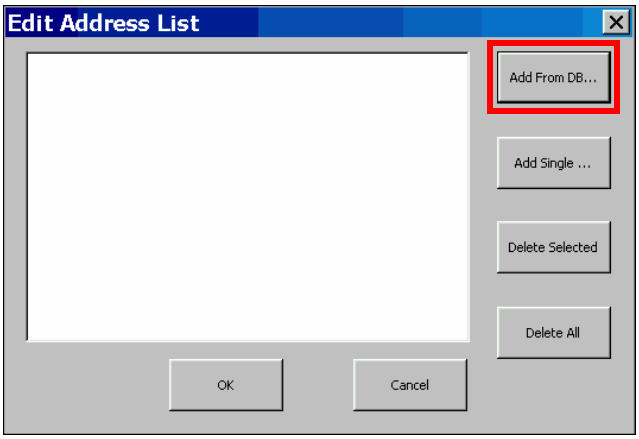


Figure 19-36: Edit Address List Dialog

5. The system displays the *Guest E-Mail Options Dialog*. Tap the **Show All Guests** button to generate an unfiltered report. Depending on the number of guests that you have in the system, an unfiltered list of E-Mails may take several minutes to generate.

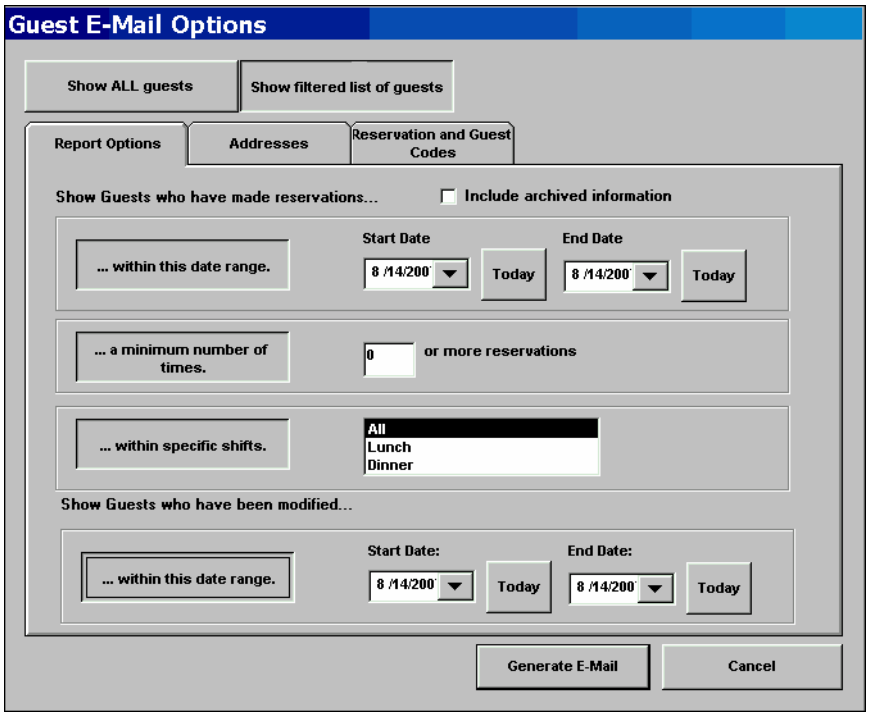


Figure 19-37: Guest E-Mail Options Dialog

6. You can also tap the **Show Filtered List of Guests** button to generate a filtered list - all the report option tabs will be activated and will allow you to configure the options for your list.
7. Tap the **Report Options Tab** and tap each button to see the configuration options. You can create an E-Mail list of guests that dined within a specific date range, dined a minimum number of times, and dined during a specific shift. You can also include guests who have been modified within a date range. Tap the box next to *Include archived information* to include archived data. The system will warn you if the report will access archived data for the report.

8. Tap the **Addresses Tab** to configure the report to filter by state, city, zip / postal code or area code (US and Canada only). Note that you can only filter addresses using one of these four criteria.

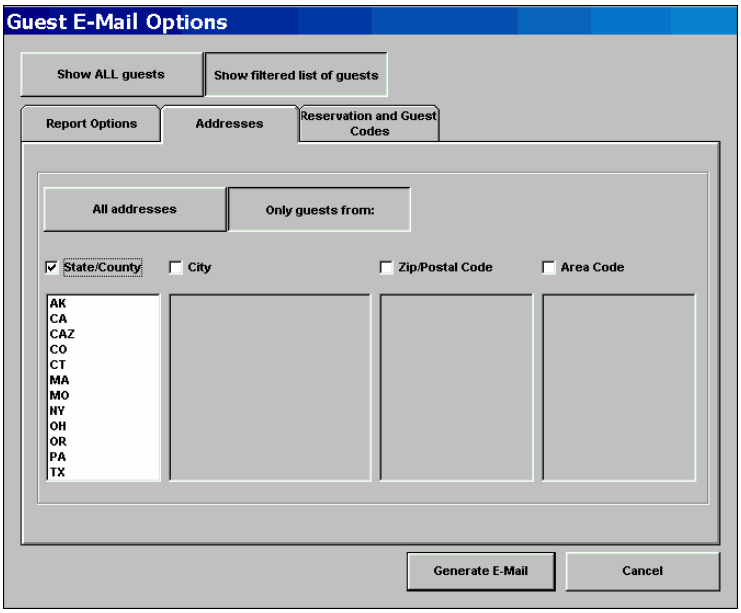


Figure 19-38: Guest E-Mail Options Dialog - Address Tab

9. Check the desired address option (state, city, zip / postal code, and area code) to display a list of values for the option. For example, checking the state option will display a list of states that have been captured in guest addresses.
10. Press the **Ctrl** key on the keyboard and tap each state that you want to select. When the system generates the list, it will only include guests that live in the selected states.
11. Tap the **Reservation and Guest Codes Tab** to see the next set of options.

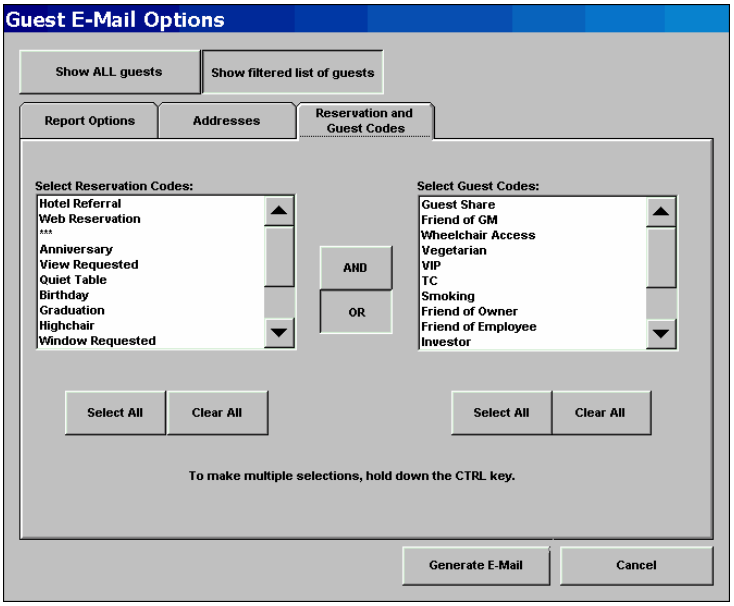


Figure 19-39: Guest E-Mail Options Dialog - Reservation and Guest Codes Tab

12. On this tab, you can filter the report by selecting the desired reservation and guest codes. To select multiple codes, hold down the **Ctrl** key on your keyboard and tap each code that you want to select.
13. Tap the **And** or **Or** button to use the desired combination of codes. For example, get E-Mail addresses for guests that had reservations that have the Birthday reservation code AND were made by guests with the VIP guest code.
14. Tap the **Generate E-Mail** button. All guests that satisfy your selection criteria AND that have an E-Mail address will be selected for this E-Mail. The system will add the guest E-Mail addresses to the *To* field on the *Edit Marketing E-Mail Dialog*.

The E-Mail distribution list will not include any guests that have opted out of the restaurant's Marketing program. Guests are considered opted-out if the No Marketing E-Mail Flag on their guest record is checked.

Changing the E-Mail Distribution List

The distribution list for your Marketing E-Mail can be reviewed in the *To field* on the *Edit Marketing E-Mail Dialog*. To change the E-Mail Distribution List:

1. Generate the E-Mail distribution list as described in the previous sections.
2. On the *Edit Marketing E-Mail Dialog*, tap the **Edit Address List** button. The *Edit Address List Dialog* is displayed.

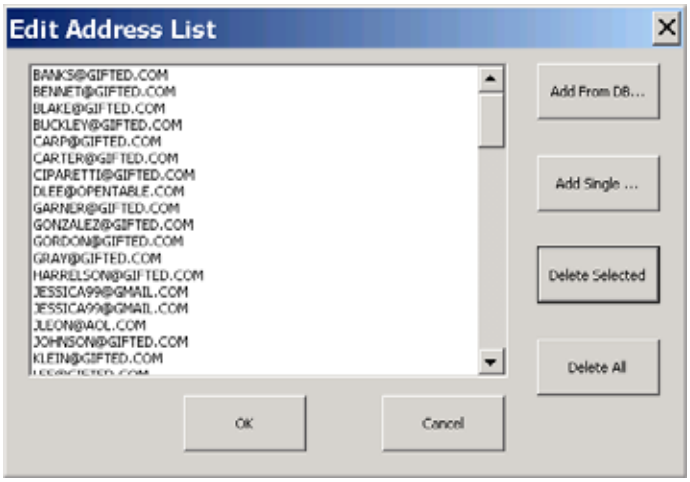


Figure 19-40: Edit Address List Dialog

3. To remove individual E-Mail addresses from the distribution list, hold down the **Ctrl** key and tap the E-Mail addresses you wish to delete. To select several E-Mail addresses in a row, tap the first entry, hold down the **Shift** key, and tap the last entry to highlight the block of E-Mail addresses. All the selected E-Mail addresses are highlighted.
4. Tap the **Delete Selected** button to remove these guest E-Mail addresses from the distribution list.
5. To add individual E-Mail addresses, tap the **Add Single ...** button, enter the E-Mail address on the *Add Single E-Mail Address Dialog*, and tap **OK**.
6. To delete all the E-Mail addresses in the distribution list, tap the **Delete All** button.

7. To change the filtering criteria, tap the **Add from DB ...** button to return to the *Guest E-Mail Options Dialog*.

As you edit your E-Mail distribution list, the system displays the # of E-Mail recipients you have selected on the Edit Marketing E-Mail Dialog underneath the Edit Address List button.

Importing HTML E-Mail Files

You can import previously saved HTML E-Mail files from the *Edit Marketing E-Mail Dialog*. A common practice is to edit HTML E-Mails using a separate software application designed specifically for editing HTML and saving your work to an HTML file (a file with extension .HTML or .HTM). You can import this file into the *OpenTable* E-Mail Editor and send it to a distribution list generated from the guest database. To import HTML E-Mail files:

1. Generate the E-Mail distribution list as described in the previous sections.
2. On the *Edit Marketing E-Mail Dialog*, tap the **Import HTML** button. The *Import HTML File Dialog* is displayed.
3. Browse through the file directories and find the HTML file that you want to import (the file extension of the file will be .HTM or .HTML). This file might have been created and saved using the *OpenTable E-Mail Editor* or some other software application. Select the file and tap **Open**.

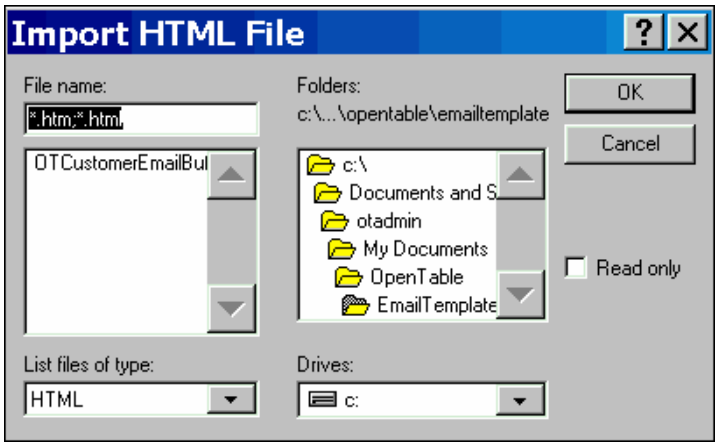


Figure 19-41: Import HTML File Dialog

4. The HTML file is imported into the *Edit Marketing E-Mail Dialog* and is displayed in the body pane. You can make additional edits to the E-Mail or send the E-Mail to your distribution list.

Using Images in Marketing E-Mails

You can add images to your Marketing E-Mails using two different methods (there are advantages and disadvantages to both methods):

- Inserting links to images that are located on a public web server (recommended).
- Embedding images directly into the E-Mail body.

Advantages of Inserting Links to Images

The main difference between inserting image links and embedding images into the E-Mail body is the location of the image files. When you insert image links into the Marketing E-Mail, the image links point to image files that are located on a publicly accessible web server. This server is typically a file directory on the server that hosts or runs your restaurant Web site. When one of your E-Mail recipients opens the Mar-

keting E-Mail sent by the restaurant, the image is downloaded from the web server and is displayed on their computer screen. If the link is incorrect or you forgot to copy the image files onto the server, the images will not display. Typically, a box with an "X" is displayed in place of the missing image.

Inserting image links is the recommended method because it:

- Makes the size of your E-Mail smaller.
- Takes less time for you to send the E-Mail.
- Decreases the chances of having your Marketing E-Mail filtered out as a virus, spam, or junk mail because there are no attachments or embedded files that might be mistaken for a virus.

Inserting image links takes a little extra time and coordination to set up initially because you have to make sure to copy the image files (files with an extension of GIF, BMP, JPG, etc.) to the right location on your server. Most professionally created Marketing E-Mails and 3rd Party Marketing E-Mail firms use this method and insert image links into the E-Mails they send out.

Advantages of Embedding Images Into the Marketing E-Mail Body

When using this method to place graphics into a Marketing E-Mail, the images are inserted directly into the E-Mail and are part of the E-Mail. Embedding images directly into the E-Mail is easier to set up initially but it is not recommended because it:

- Makes each E-Mail larger in size.
- Increases the likelihood of having the E-Mail not reach the intended guest because it has been filtered out as spam.

Inserting Links to Images

To insert image links into the E-Mail body:

1. Generate the E-Mail distribution list as described in the previous sections.
2. Place your cursor in the E-Mail Body pane at the exact location where you want the image to appear.
3. On the *Edit Marketing E-Mail Dialog*, tap the **Insert Image Links** button. The *Insert Image Link Dialog* is displayed.
4. Type in the exact location and file name of the image file. An example of an image link might look like this (without the quotes): "http://www.myrestaurant.com/Images/Graphic1.gif". The image file must be in a location that is accessible to the public like your web server. Tap **OK** to insert the link.

Insert Image Link
You are inserting a link to an image located on an Internet server. You must copy the image file to this location for recipients to see this image properly.
Enter your image link (Ex: http://www.MyRestaurant.com/Images/Logo.gif)
http://
OK
Cancel

Figure 19-42: Insert Image Link Dialog

If you store all your images in the same location, you can configure the system to always pre-populate the Insert Image Link dialog with the same location. Go to the Admin View / E-Mail Setting area to edit the Marketing E-Mail Image Directory.

5. Continue editing the E-Mail body and inserting links. You can tap the **Save** button to periodically save your changes to an HTML E-Mail file.

Web links are not active when editing or previewing your E-Mail. Links are only active when the recipient opens up the E-Mail and clicks on them.

Embed Images

To embed images directly into the E-Mail body:

1. Generate the E-Mail distribution list as described in the previous sections.
2. Place your cursor in the *E-Mail Body pane* at the exact location where you want the image to appear.
3. On the *Edit Marketing E-Mail Dialog,* tap the **Embed Image** button. The *Embed Image Dialog* is displayed.
4. Browse for your image file. Depending on the type of image file you want to embed (BMP, JPG, or GIF), you can tap the **Files of Type** dropdown to see other file types.

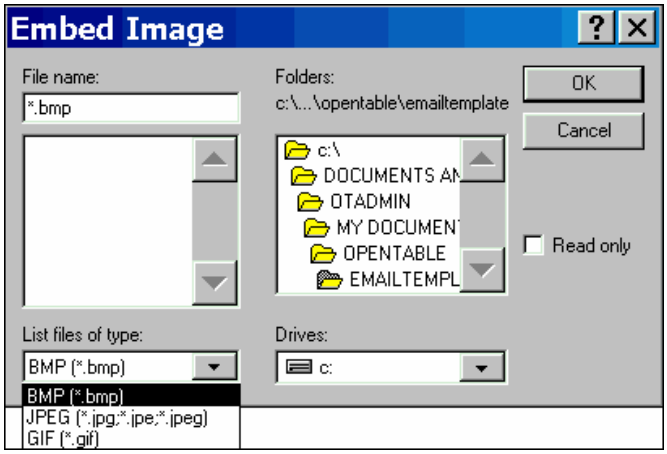


Figure 19-43: Embed Image Dialog

5. When you find your file, tap the file and tap the **Open** button. The image is embedded into the E-Mail body.
6. Continue editing the E-Mail body and embedding images. You can tap the **Save** button to periodically save your changes to an HTML E-Mail file.

Composing HTML Marketing E-Mails

To compose HTML Marketing E-Mails:

1. Generate an E-Mail distribution list as described in the previous sections.
2. Tap the **Subject Field** and type in a subject line. A subject line is required for sending E-Mails.
3. Tap the **E-Mail Body Pane** and compose your E-Mail. You can format your E-Mail by highlighting the text and tapping the buttons on the editing toolbar. Other options for creating content include:
   - Inserting image links to images on your restaurant's web server.
   - Cutting and pasting content from other applications.

When creating E-Mail content in other applications, make sure that the fonts you use are in the font dropdown on the Edit Marketing E-Mail Dialog in the OpenTable system. If you use an unsupported font, the formatting of the text in the E-Mail may not appear as intended.

   - Importing content saved in HTML format (Hypertext Markup Language) from applications like Microsoft Word. Tap the **Import HTML** button to browse to the file location on your computer and import the HTML file into the E-Mail body.

You can no longer import RTF files (Rich Text Format). If you want to import RTF files, edit them in Microsoft Word and save them in HTML format.

4. Tap the **Save** icon on the editing toolbar to save your HTML E-Mail to an HTML file. Select the directory location and file name for your HTML file on the *Save HTML Document Dialog* and tap **Save**. You can load the saved file later by tapping the **Import HTML** button.

You can use other software packages designed specifically for editing HTML to create more sophisticated HTML E-Mails. Save the HTML file and import the file into the E-Mail body on the Edit Marketing E-Mail Dialog to send them to your E-Mail distribution list.

Attaching Documents to Marketing E-Mails

To attach a document to Marketing E-Mails:

1. If you want to send any attachments in your E-Mail, tap the **Attachments Icon** next to the Attachments dropdown on the *Edit Marketing E-Mail Dialog* to display the *Edit Attachment List Dialog*.
2. Tap the **Add ...** button. The *Attach File Dialog* is displayed.
3. Browse for your file and tap the **Open** button to select it. Tap the **OK** button to attach the file to your E-Mail. You can attach up to three documents to a Marketing E-Mail and there is a one megabyte size limit for each Marketing E-Mail.

When you save your HTML E-Mail, only the E-Mail body is saved. The E-Mail distribution list and any attachments to the E-Mail are not saved.

Sending Marketing E-Mails

To send Marketing E-Mails:

1. Once your E-Mail distribution list, subject, and message are complete, tap the **Preview** button on the editing toolbar to preview your E-Mail.
2. Send a test E-Mail to your own E-Mail address by tapping the **Send Test E-Mail** button and entering your E-Mail address. (Sending a test E-Mail to your own account is a good practice and allows you to review what your E-Mail looks like before sending it to a larger guest distribution list.) To send test E-Mails to multiple addresses, enter the E-Mail addresses and separate them with commas.

The Send button is not enabled until you first send a test E-Mail.

3. Sending a test E-Mail enables the *Send* button. If you are satisfied with your E-Mail, tap the **Send** button to send your E-Mail to the distribution list.

Why You Should Send Test E-Mails

After creating and editing your HTML E-Mails, it is very important to send test E-Mails to your own E-Mail account before sending them to a wider distribution list. This extra step is to ensure that the final product looks the way you expect it to look and that all image links work properly and display images properly. It is highly recommended to send test E-Mails to a few different test E-Mail addresses on different E-Mail services because different E-Mail programs interpret and display HTML and images differently. It is also recommended to open your test E-Mails on a different computer than the one you use to edit and send your E-Mails to ensure that the images display properly. As a general rule of thumb, you should always send test E-Mails after you make changes to the E-Mail and before you send it to a wider audience.

Although HTML is a fairly mature standard, all E-Mail clients (AOL, Yahoo, GMail, etc.) interpret HTML in slightly different ways. It is a good practice to send test E-Mails to several different types of E-Mail clients to ensure that your E-Mail looks and works the way you intend it to.

Mailing Labels

The mailing labels feature allows you to print mailing or shipping labels for all guests with addresses in the system. To generate mailing labels:

1. Tap **Reports** on the *Side Navigation Bar*. Then tap the **Mailing Labels** button.
2. In the *Guest Mailing Labels Options Dialog,* tap the **Show All Guests** button to generate an unfiltered report. Depending on the number of guests that you have in the system, an unfiltered report may take several minutes to generate.

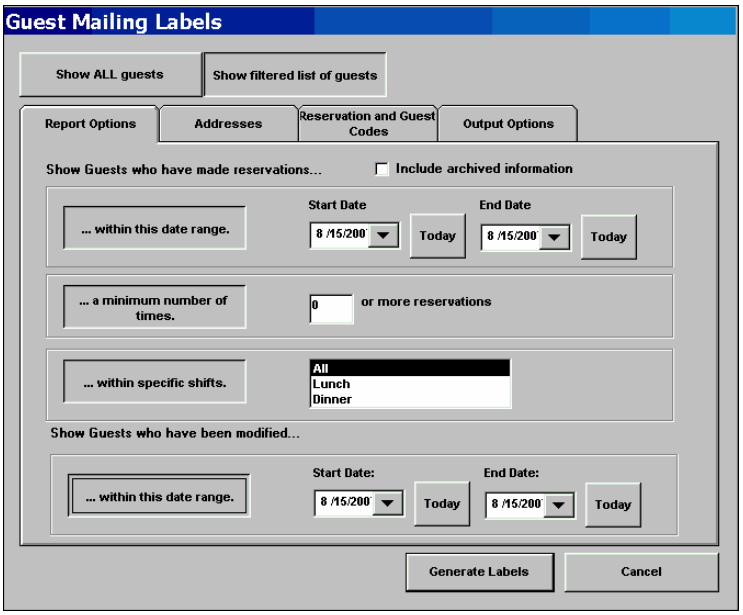


Figure 19-44: Guest Mailing Labels Report Options Dialog

3. You can also tap the **Show Filtered List of Guests** button to generate a filtered report - all the report option tabs will be activated and will allow you to configure the options for your report.
4. Tap the **Report Options Tab** and tap each button to see the configuration options. You can create mailing labels for guests that dined within a specific date range, dined a minimum number of times, and dined during a specific shift. You can also include guests who have been modified within a date range. Tap the box next to *Include archived information* to include archived data.

5. Tap the **Addresses Tab** to configure the report to filter by state, city, zip / postal code or area code (US and Canada only). Note that you can only filter addresses using one of these four criteria.

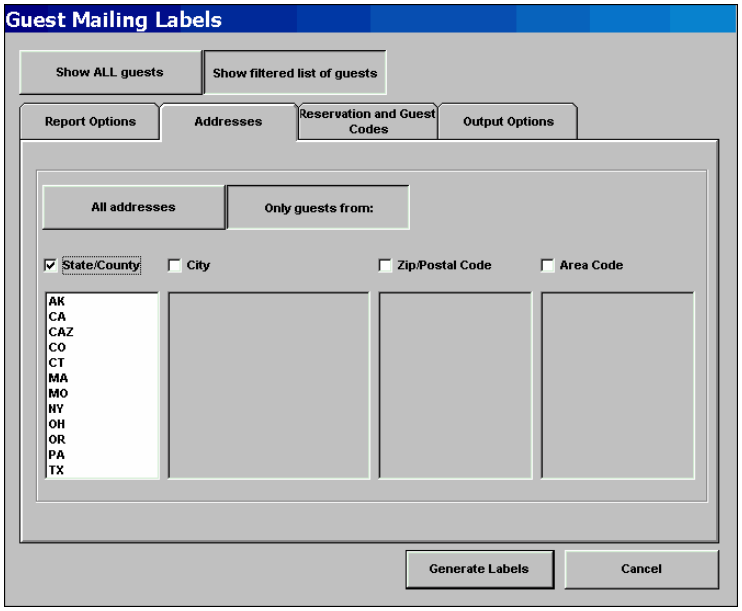


Figure 19-45: Guest Mailing Labels Addresses Tab

6. Check the desired address option (state, city, zip / postal code, and area code) to display a list of values for the option. For example, checking the state option will display a list of states that have been captured in guest addresses.
7. Press the **Ctrl** key on the keyboard and tap each state that you want to select. When the system generates the report, it will only include guests that live in the selected states.
8. Tap the **Reservation and Guest Codes Tab** to see the next set of options.

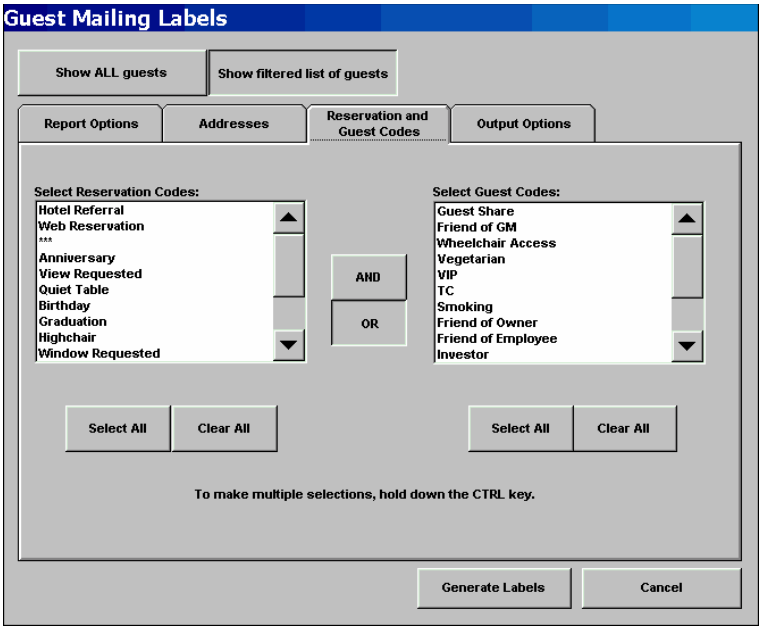


Figure 19-46: Guest Mailing Labels Reservation and Guest Codes Tab

9. On this tab, you can filter the report by selecting the desired reservation and guest codes. To select multiple codes, hold down the **Ctrl** key on your keyboard and tap each code that you want to select.
10. Tap the **And** or **Or** button to use the desired combination of codes. For example, include guests that had reservations that have the Birthday reservation code AND were made by guests with the VIP guest code.
11. Tap the **Output Options Tab** to see the next set of report options.

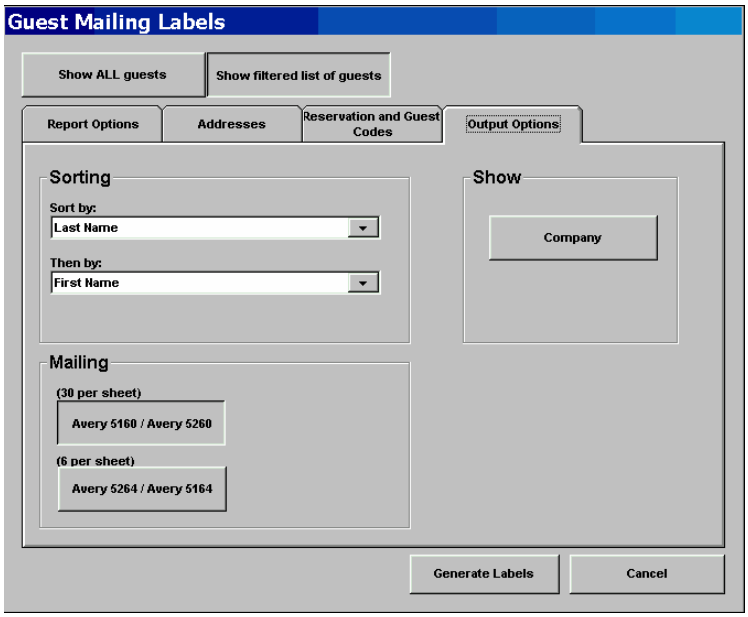


Figure 19-47: Guest Mailing Labels Output Options Tab

12. You can use this tab to change the sort order of the mailing labels report. Tap the dropdown list controls to select the desired fields to sort by.
13. On this tab, you can also select the *Company* field to display on the report. Tap the **Company** button to display it on the report (the button will look like it has been pressed in).
14. Tap the **Generate Labels** button to create your mailing labels.

Mailing labels contain the following fields:

- First Name
- Last Name
- Company
- Address
- City
- State / County / Region / Province
- Zip / Postal Code

Notes on Mailing Labels

- The *OpenTable* system references Avery (a standard label manufacturer) label types for printing mailing labels.
- In order for a mailing label to print for a guest, the guest must have the following fields: Last Name, Address1, City, and Zip / Postal Code.

Guest Export

You can use the guest export feature to easily export all guest information from the *OpenTable* system into a tab-delimited file. You can import this file into Microsoft Excel, Microsoft Access, or some other type

of database program. This enables users to analyze their guest data and/or provide the guest information to their 3rd party partners for E-Mail marketing.

The fields that are exported using the guest export feature include:

- Member ID
- Guest Last Name
- Guest First Name
- Guest Company
- Guest E-Mail Address
- E-Mail Opt In
- Mail Opt In
- Address 1
- Address 2
- City
- State
- Zip
- Country
- Guest Notes
- Birthday
- Other Birthday
- Anniversary
- Work Phone Country Code
- Work Phone
- Home Phone Country Code
- Home Phone
- Mobile Phone Country Code
- Mobile Phone
- Pager Phone Country Code
- Pager Phone
- Fax Phone Country Code
- Fax Phone
- Hotel Phone Country Code
- Hotel Phone
- Other Phone Country Code
- Other Phone
- Reservation Count
- Cancellation Count
- No Show Count
- Walk-In Count
- Average Amount Spent
- Total Amount Spent
- Creation Date
- Last Modified
- Never Archive
- Guest was Imported
- Is Archived
- Guest Codes (1-20)

You CANNOT perform the guest export if you are using OpenTable Anywhere. You must be using the OpenTable Server or Terminal to generate the file. This precaution is to safeguard against performance problems in pushing large export files across the web.

To export all guests:

1. Tap the **Reports** button on the *Side Navigation Bar.* Then tap the **Guest Export** button.
2. If prompted, enter a password that has access to this area to continue.

3. The system displays the *Guest Export Dialog* informing you that all guests in your *OpenTable* system are about to be exported. Select any desired export options.

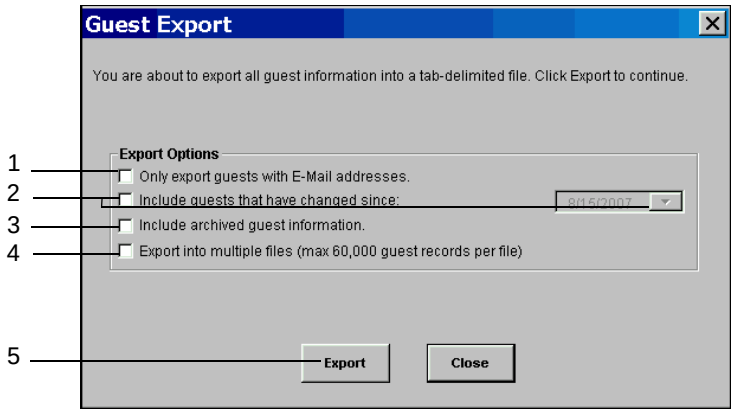


Figure 19-48: Guest Export Dialog - Warning Message

1	Export Guests with E-Mail	Only exports guests with an E-Mail address	4	Export into multiple files	Depending on report size, export the report in multiple files**
2	Include Guest since:	Guests with updated guest data since (specify date)	5	Export	Tap to start the export process
3	Include Archived Guest Information	Includes archived guest data*			

* If you select the *Include archived guest information* box, the system will warn you that it will access archived data for the report (typically guests that have not made a reservation in more than 24 months).

** If you select *Export into multiple files* box, each file will contain a maximum of 60,000 guest records . For example, a report with 120,000 total guests will generate 2 files; each file consisting of 60,000 guests.

4. Tap the **Export** button to begin the export. The system displays a progress bar as it exports guests. The export process may take several minutes, depending on the size of your guest database.
5. When the guest export is complete, the system displays another *Guest Export Dialog* informing you that the export is complete. The message also lists the number of guests exported, the export file name(s) and directory location.

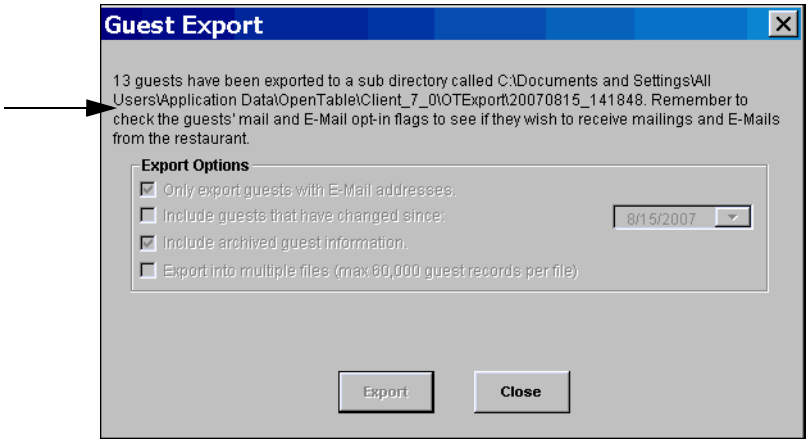

Guest Export
13 guests have been exported to a sub directory called C:\Documents and Settings\All Users\Application Data\OpenTable\Client_7_0\OTExport\20070815_141848. Remember to check the guests' mail and E-Mail opt-in flags to see if they wish to receive mailings and E-Mails from the restaurant.
Export Options
Only export guests with E-Mail addresses.
Include guests that have changed since:
8/15/2007
Include archived guest information.
Export into multiple files (max 60,000 guest records per file)
Export
Close

Figure 19-49: Guest Export Dialog - Completion Message

6. Tap **Close** to clear the dialog.
7. To access the file, first hit **Shift F10** to close the *OpenTable* system.
8. Double-tap the **My Computer** icon on the desktop and double-tap “Local Disk (C:)”. Navigate to the directory listed in the *Guest Export Dialog* to find the file.

After generating the guest export file, be sure to delete the file or move it to some type of removable storage media like a USB key drive. This ensures the safety and security of your guest data.

Importing Guests Into Microsoft Excel

To import guests into Microsoft Excel:

1. If you do not have Microsoft Excel on the computer that contains the export file, you must copy the export file to another computer that has Microsoft Excel.
2. Hit **Shift F10** to close the *OpenTable* system.
3. Double-tap the **My Computer** icon on the desktop and double-tap “Local Disk (C:)”. Navigate to the directory listed in the *Guest Export Dialog* to find the file.
4. Tap the file once, hit **Shift F10** and select “Open With.” If your system has a mouse, you can also right click on the file and click on “Open With.” Then select Microsoft Excel.
5. Microsoft Excel opens the guest export file and arranges all the information in the appropriate columns. The first row of the export file contains column headings.

Before sending traditional mail or E-Mail communications to guests, be sure to check that the guest has opted-in to receiving these communications - there are mail and E-Mail opt-in fields that indicate the guest's preference.

- If you double-tap on the file name instead of opening the file following the steps listed above, most systems will open the guest export file in a text editor like Notepad or Wordpad (depending on the computer's configuration). The guest data will not be organized into columns and will be difficult to read.
- The maximum # of rows in a Microsoft Excel spreadsheet is 65,536. If you have more than 65,535 guests in your guest database, you can select the export option that splits up the export into multiple files. Each file will contain a maximum of 60,000 guest records.

Chapter 20: Reservation Reminder E-Mails

The system can send three types of reservation E-Mails: reservation confirmation, reservation reminder and reservation cancellation E-Mails. Reservation confirmation E-Mails can be sent when you make a new reservation for a guest to confirm the details of the reservation. A reservation reminder E-Mail can be sent on the morning of the day the reservation is scheduled to take place. In order for reservation E-Mails to be sent, you must:

- Ensure that you are connected to the web.
- Enter valid E-Mail gateway configuration settings, including a restaurant E-Mail address. All E-Mail replies to Marketing and reservation confirmation and reminder E-Mails will be sent to the restaurant E-Mail address. For more information, refer to "E-Mail Settings" on page 172.
- Check the box next to the *Display Confirmation E-Mail Dialog* in the *Admin / System Settings / Reservation Settings Tab*. For more information, refer to "Reservation Options" on page 146.

Sending a Reservation Reminder E-Mail

To send a reservation reminder E-Mail:

1. After booking a new reservation and tapping **Save** on the *Make A Reservation Dialog*, the system will display the *Confirm Reservation Dialog*.

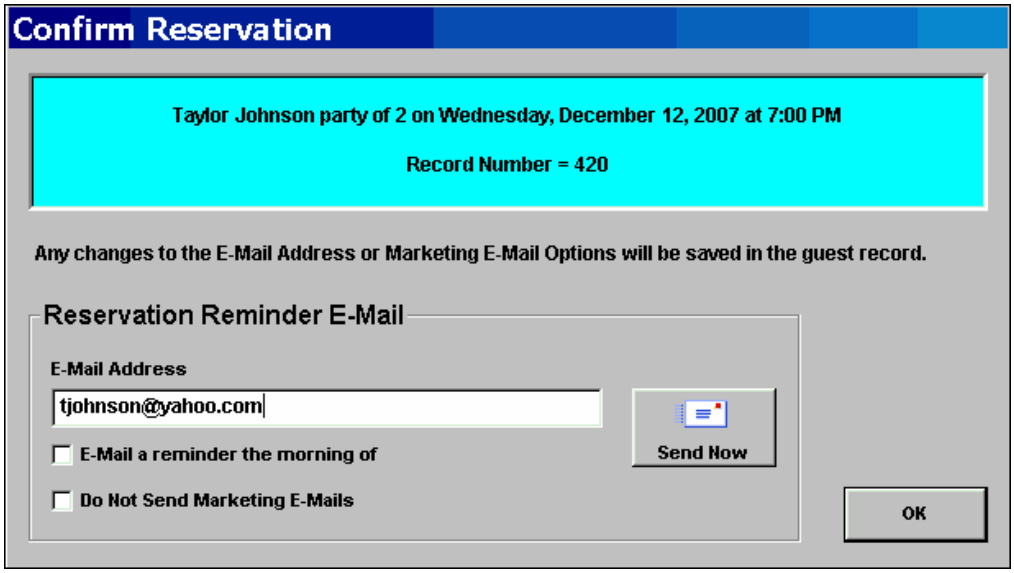

Confirm Reservation
Taylor Johnson party of 2 on Wednesday, December 12, 2007 at 7:00 PM
Record Number = 420
Any changes to the E-Mail Address or Marketing E-Mail Options will be saved in the guest record.
Reservation Reminder E-Mail
E-Mail Address
tjohnson@yahoo.com
Send Now
E-Mail a reminder the morning of
Do Not Send Marketing E-Mails
OK

Figure 20-1: Confirm Reservation Dialog

2. If the guest has an E-Mail address in the system, the system will automatically populate the address field with the E-Mail address. If the guest does not have an E-Mail address in the system, you can enter one manually in the address field. You have a few options on the *Confirm Reservation Dialog*.
   - If this is a reservation for today, the *E-Mail a Reminder the Morning of* option will be grayed out. If this is a reservation for a future date, you can check the box, *E-Mail a Reminder the Morning of* option to let the system send a reminder E-Mail on the morning of the reservation.
   - Check the box, *Do Not Send Marketing E-Mails* option to opt-out the guest from any marketing E-Mail communication (the guest will still receive any reservation related E-Mails). This setting will be saved as part of the guest's preferences.

- Manually entering an E-Mail address or changing the pre-populated address on this dialog and tapping the **Send Now** button will automatically save the entered E-Mail address into the guest record.

3. Tap the **Send Now** button to send the reservation confirmation E-Mail.

Notes on reservation E-Mails

- You can customize the text in the E-Mail in the *Custom E-Mail Text* field. Tap **Admin** on the *Side Navigation Bar* and tap the **E-Mail Settings** button.
- Reservation confirmation and reminder E-Mails for reservations made online at www.opentable.com are sent by the *OpenTable* website and NOT by the *OpenTable* system at the restaurant.
- Selecting the No Marketing E-Mail option on the *Guest Information Dialog* will set the No Marketing E-Mail flag for this guest in the *Guests View.* The guest will NOT receive any Marketing E-Mails from the restaurant, but will continue to receive reservation-related E-Mails.
- You can also resend reservation confirmation E-Mails after a change, resend reservation confirmation E-Mails manually or send cancellation E-Mails.

Chapter 21: Frequently Asked Questions

General

What do I do when I have a problem or question?

For immediate assistance, please call Customer Support. Support phone numbers vary by country and are listed on the back page of the User Manual.

If your problem is non-urgent, you can send an E-Mail from the *OpenTable* system to Customer Support. Tap **Admin** on the *Side Navigation Bar*. Tap the **Contact OpenTable** button and fill in the template's subject line, priority of message, and enter your E-Mail message. Tap the **Send Now** button at the bottom. You can expect an E-Mail response within 24 hours.

What is the password for the *OpenTable* user login?

When turning on your *OpenTable* terminal and logging in to the computer, users will usually log in as "opentable" (without the quotes). If you do not know the password for the *OpenTable* user, please contact Customer Support. Support phone numbers vary by country and are listed on the back page of the user manual.

How do I restart the OpenTable system if necessary?

Double-tap the **OpenTable** icon on the desktop. Alternatively, tap the **Start** button in the lower left corner of the screen. If the **Start** button is not visible, press the **Ctrl** and **Esc** keys on the keyboard simultaneously to display the Windows Start Menu.

Tap the **OpenTable** icon on the *Start Menu* to launch the system.

What should I do if my connection status displays “Offline” and a red light?

When you are offline, you are not connected to the *OpenTable* website, and web diners cannot make reservations to your restaurant. Tap the **Offline** button to see a detailed description of your *OpenTable* connection status in the *Status Panel Dialog*. Tap **Connect Now.** The system will attempt to restore your web connection. If you continue to experience problems, follow the suggested troubleshooting steps. If you are unable to resolve the problem, please contact Customer Support. Support phone numbers vary by country and are listed on the back page of the User Manual.

How do I password protect certain OpenTable features?

As a manager or general manager, you may want to password protect some features in the *OpenTable* system. To lock a feature and require a password, tap **Admin** on the *Side Navigation Bar*. In the lower right portion of the *Admin View*, tap the **Access Rights** button. If prompted, enter a password that has access to this area to continue. In the *Edit Access Rights Dialog,* review the title and descriptions. Tap an empty space in the *Lock* column next to the feature to add a password. Repeat as necessary. To unlock a feature, double tap the checkmark. Tap **Save** to save your changes.

How do I change a Password?

To change a password, tap **Admin** on the *Side Navigation Bar*. Tap the **Change Password** button. If prompted, enter a password that has access to this area to continue. In the *Change Password Dialog*, enter the old password. Enter a new password and re-enter the password to reconfirm. Tap **Save** to save your changes.

How is Guest Information Archived?

Old reservation information and guest data is automatically archived in the *OpenTable* system. Reservations older than 18 months or guest that have not made a reservation in the last 24 months are archived. In the *Guest Report Options Dialog*, you can check the box next to *Include archived information* (reports may take longer to run) to include archived guests.

How do I leave permanent or temporary notes for the staff?

To leave a permanent or temporary note to your staff, tap the **Notes View** button on the *Side Navigation Bar*. To add, change and delete notes, tap the desired tab, enter your text, and tap **Save**. Shift notes change from shift to shift and can be configured to automatically pop up when navigating to the shift. To add pop up notes, check the box next to *Pop up these notes.* The icon on the **Notes View** button on the *Side Navigation Bar* will turn red if there are shift notes for the current shift.

How does the screen saver work?

The screen saver launches after a certain amount of time of inactivity on the *OpenTable* system. To activate the screen saver, tap **Admin** on the *Side Navigation Bar*. In the upper left portion of the Admin View, tap the **System Settings** button, then tap the **General Settings Tab**. Enter the number of minutes of idle time in the screen saver *minutes* field. Tap **Save** to save your changes.

To access the reservation book once the screen saver has been launched, click or tap anywhere on the screen. You can configure the system to require a password to clear the screen saver. For more information, refer to "Access Rights" on page 179.

What is a country code?

When dialing numbers outside of your country, you need to dial a country code. Each country has a different country code. For example, the country code for the United States and Canada is "1" and the country code for the United Kingdom is "44". For more information about dialing international phone numbers, please consult your local telecommunications provider.

Working with Reservation Sheets

What is the Scheduling Wizard?

The *Scheduling Wizard* provides step-by-step instructions to help you complete different tasks. Each *Wizard* page displays the numbered steps needed to complete each task and easy-to-follow instructions. The *Wizard* can help you do the following:

- Open or change a shift - open or change ONE shift on a SINGLE day.
- Open or change multiple shifts - open or change MULTIPLE shifts on a SINGLE day.
- Schedule a date range - change shifts across several days.
- Close a shift - close ONE shift on a SINGLE day.
- Close a day - close ALL shifts on a SINGLE day.
- Close a date range - closed ALL shifts across several days.
- Edit *Default or Regular Schedule*s - change the default or "Regular" schedules.

For more information, refer to "OpenTable Scheduling Wizard" on page 122.

How do I create a new reservation sheet?

Reservations sheets are made up of time slots that represent when the restaurant will accept dining reservations. To create a reservation sheet, tap **Admin** on the *Side Navigation Bar*. Tap the **Sheets, Floor Layouts, Schedules** button. If prompted, enter a password that has access to this area to continue. Tap

Yes to backup your reservation book. (For more information, refer to "Adding / Creating a Reservation Sheet" on page 85.)

Tap the **Sheets Tab** to view a list of existing reservation sheets. To create a new reservation sheet, tap the **Add** button. In the *Properties Dialog*, enter a new sheet name and use the dropdown menu to select the shift and type. To change your first and / or last slot time, tap the clock and choose the appropriate times. Review the turn times for this sheet. To change a turn time for a party size, tap the **clock** icon and select the turn time and tap **Save**. To assign a floor layout to your reservation sheet, tap the **pencil** icon to view a list of existing floor layouts. To assign a floor layout to your reservation sheet, highlight the floor layout that you want to use and tap the right arrow button. (For more information, refer to "Assigning Floor Layouts to the Sheet" on page 88.) Tap **OK** in the *Assign Floor Layouts Dialog.*

Tap the **Edit Sheet Tab** at the top to begin adding your slots. Tap the **Add** button to configure your slots. In the *Add Slot(s) Dialog,* configure the slot type, the slot time, party size minimum and maximum, and if you want to repeat this configuration. Tap **Add** or **Add and Continue** button if you wish to continue adding slots. When you are done configuring your slots, tap the **Add** button to return to the **Edit Sheet Tab** (For more information, refer to "Adding Slots to Reservation Sheets" on page 92.) and tap **Save**.

After you have completed your reservation sheet, you need to assign it. See the next question for more details.

How do I assign my reservation sheet to be used on a specific date?

Tap *Admin View/ Sheets, Floor Layouts, Schedules.* If prompted, enter a password that has access to this area to continue. Tap **Yes** to backup your reservation book. Tap the **Schedules Tab** to view a calendar with different reservation sheet assignments. In the *Calendar View*, select the day(s) that you want to assign your reservation sheet. In the *Reservation Sheet Assignment* section, select the shift and tap the dropdown menu to select your reservation sheet. Tap **Save** on the *Top Navigation Bar* to save your changes.

How do I reassign my Default or REGULAR Schedule for the day?

Tap *Admin View / Sheets, Floor Layouts, Schedules.* If prompted, enter a password that has access to this area to continue. Tap **Yes** to backup your reservation book. Tap the **Schedules Tab** to see the *Calendar View.* In the calendar month, select the day(s) that you want to reassign your default schedule. Tap the **Use Defaults** button on the *Top Navigation Bar* to reassign your default schedule on that day. Tap **Save** on the *Top Navigation Bar* to save your changes.

What is an Alternate Schedule?

An alternate schedule is a schedule that is different from your *Default or REGULAR schedule*. For example, if you are open on Thanksgiving Day, you may have a different schedule from your *Default or REGULAR schedule*. When you assign an *Alternate Schedule*, the dates appear in red in the monthly *Calendar View*.

To create an alternate schedule, tap *Admin View / Sheets, Floor Layouts, Schedules.* If prompted, enter a password that has access to this area to continue. Tap **Yes** to backup your reservation book. Tap the **Schedules Tab** to see the *Calendar View*. Tap the **Calendar** button on the *Top Navigation Bar* to see a dropdown menu of selections. Tap **Alternate Schedule** to see a list of alternate schedules. For more information, refer to "Alternate Schedules" on page 113.

Prior to assigning an *Alternate Schedule*, you must have a reservation sheet. If a reservation sheet does not exist, copy an existing one or add a new one. For more information, refer to "Adding / Creating a Reservation Sheet" on page 85.

What is the difference between a Default Schedule and an Alternate Schedule?

A Default Schedule is the restaurant's regular schedule for each of the seven days of the week (Sunday - Saturday). An Alternate Schedule is a schedule that differs from your Default Schedule (for example, New

Year's Eve or Valentine's Day). If you create an Alternate Schedule it will temporarily replace your Default Schedule on those days. After the Alternate Schedule has passed, the system will automatically switch back to your Default Schedule.

What is a Date Range?

A date range allows you to create a repeating schedule over several days that temporarily replaces your *Default or REGULAR schedule*. You can create a date range to close all shifts or use a different shift over several days. When the range passes, your schedule returns to your *Default or REGULAR schedule*. For example, you can create a holiday schedule with a date range of December 7, 2007 as the start date and December 11, 2007 as the end date. On December 12, 2007, the system automatically returns to your default schedule.

Prior to setting up a different schedule with a date range, set-up a reservation sheet first. Also, schedules established for a date range cannot overlap with other date ranges. Use the *Scheduling Wizard* to help you create a date range using another schedule. For more information, refer to "Schedule a Date Range Wizard" on page 126.

How do I insert or change an empty slot for one shift?

On occasion, you may need to add or change empty slots for one shift to adjust the operational flow. If you need to make slot changes that affect multiple days or shifts, you must change the reservation sheet assigned to those shifts. For more information, refer to "Editing a Reservation Sheet - Details" on page 86.

To insert an empty slot for one shift, tap the **Sheet** or **Book View** button on the *Side Navigation Bar*. Tap the date and shift buttons to select the desired date and shift. Tap the **Add** button on the *Top Navigation Bar*. If prompted, enter a password that has access to this area to continue.

In the *Insert Slot Dialog*, begin setting slot attributes (time, party size, etc.) for the new slot. Tap **Save**. A new slot is added and a *red (+)* is displayed in the "*" column next to the new slot.

To change an empty slot, tap the **Sheet** or **Book View** button on the *Side Navigation Bar*. Tap the date and shift buttons to select the desired date and shift. Tap an empty reservation slot, then tap the **Change** button on the *Top Navigation Bar*. If prompted, enter a password that has access to this area to continue. Tap the **Configure Slot** button. Change the slot attributes (time, party size, etc.) and tap **Save**. The slot is changed for this shift only and a solid red triangle (Standard slot) or blue triangle (Manager slot) is displayed in the "*" column next to the changed slot.

What do the red and blue symbols mean in the * column on some of the views?

The * column on the left side of the *Sheet View, Book View,* and *Floor View* contains visual indicators that identify slots that have been inserted or changed.

- Solid Red Plus Sign (+): *Standard Slot* was inserted into the shift.

- Solid Red Triangle: Standard Slot was changed in some way (time, party size, table #, slot was blocked).

- Solid Blue Triangle: Manager Slot was changed in some way (time, party size, table #, slot was blocked).

Working with Reservations

How do I make a new reservation in the Sheet / Book View?

To make a new reservation, tap the *Sheet View* or *Book View* buttons on the *Side Navigation Bar*. Tap the date button on the *Top Navigation Bar* to view the *Calendar*. Tap the desired date and tap **OK**.

The screen will refresh and display the day's reservations and available slots. Tap an empty reservation slot and hit **Enter** on your keyboard or, double-tap the desired (empty) slot. The system displays the *Guest Identification Dialog*.

Enter the guest's last name, first name, phone number or company name. If the correct guest name appears in the list (check the phone number), double-tap the name or tap the guest name once to highlight it and tap the **Select Guest** button. If there are no matches for your guest, tap the **New Guest** button to create a new guest record.

The *Make A Reservation Dialog* will appear. Input all reservation details and tap **Save** to save the reservation.

How do I make a new reservation in the Reserve View?

Tap **Reserve View** on the *Side Navigation Bar*. Tap the appropriate buttons to select the desired date, party size, shift, and time for the reservation you want to book.

The system displays up to three standard reservation slots and one manager slot (if any) based on your selected search criteria. If there is an exact match, the slot will appear as the 2nd button. The system will also display the nearest available standard slots before and after your selected time as the 1st and 3rd buttons. If there is no exact match, the 2nd button will be blank.

Decide which of the available reservation slots to use. Tapping that time slot brings up the *Guest Identification Dialog*. Enter the guest's name and if the correct guest appears in the list (check the phone number), double-tap the name or tap the guest name once to highlight it. Tap the **Select Guest** button. If there are no matches, tap the **New Guest** button. Enter the reservation details in the *Make A Reservation Dialog* and tap **Save**.

How do I move or change a reservation?

There are two ways to move or change a reservation - using the *Change* button on the *Top Navigation Bar* or using the time arrows in the *Make A Reservation Dialog* to change a reservation time for the same day.

In the first method (recommended), highlight the reservation and then tap the **Change** button on the *Top Navigation Bar*. Select **Move Entry** and the system will display the name and party size of the reservation at the bottom of the screen.

To move the reservation to an existing empty reservation slot, tap an empty slot and tap the **Move** button at the bottom. You can tap the **Calendar** arrow buttons on the *Top Navigation Bar* to move the reservation to a different day. After you've selected the new date and / or time tap the **Move** button again. Then, tap **OK** to complete the move.

In the second method, double tap the reservation and the *Make A Reservation Dialog* appears. Use the time arrows at the top to move the reservation to the new time. When the new time is selected, tap **Save**.

If your system is configured to password protect the ability to move or change a reservation, the system will prompt you for a password. Enter a valid password and tap **OK**. The second method is not recommended because it can greatly impact the operational flow.

How do I cancel a reservation?

You can cancel a reservation in the *Change Party Status Dialog* or in the *Change Entry Dialog*. Both methods cancel the reservation and remove it from all views.

To cancel a reservations using *Change Party Status*, tap the reservation you wish to cancel. Tap the **Status** button on the *Top Navigation Bar* to see a list of party statuses. Tap the **Cancelled** button and then tap **Yes** to confirm the cancellation.

To cancel a reservations using *Change Entry,* tap the reservation you wish to cancel. Tap the **Change** button on the *Top Navigation Bar.* Tap the **Cancelled** button and then tap **Yes** to confirm the cancellation.

How do I No-Show a party?

Highlight the reservation you wish to no show by tapping the reservation once. Tap the **Status** button on the *Top Navigation Bar* and then tap the **No Show** button. The system changes the status to *No Show*. The reservation is still visible in the different views but the background color changes to the color that was chosen in the *Admin View / Table Status Settings* to represent a *No Show*.

What is the Reservation Change Log?

The reservation change log documents reservation information, such as date and time of the original reservation, changes to date, time or party size, adding, viewing or changing credit card information and changing the guest name. It also displays the name of the computer that was used to change the reservations. To view and / or print the reservation change log, highlight the reservation in *Sheet, Book* or *Floor View* and tap the **Change** button on the *Top Navigation Bar*. In the *Change Entry Dialog*, tap the **View Change Log** button. Tap **OK** to return to your *Sheet, Book* or *Floor View* or tap **Print** to print the reservation change log.

How do I make a large party reservation for a party size > the slot maximum?

To make a reservation for a party larger than the existing reservation slot, you must overbook the reservation slot. Double-tap the desired reservation slot and make the reservation following the usual process. Increase the party size field to the desired party size and save the reservation. If prompted, enter a password that has access to this area to continue.

If you do overbook reservation slots, it is strongly recommended that you also block other slots within the same time period as your large party reservation in order to avoid overbooking the restaurant.

How do I make schedule changes from the Sheet and Book Views?

Tap the **Options** button on the *Top Navigation Bar* in *Sheet and Book Views*. The **Options** button displays a list of functions that you can easily access. Tap the **Scheduling Wizard** button to access the Wizard's main menu to make scheduling changes. Tap the **Close this Day** or **Close this Shift** button to complete the requests in two easy steps. Tap the **Edit This Reservation Sheet** button to jump directly to the *Edit Sheet Dialog*. If prompted, enter a password that has access to this area to continue.

How do I add special requests for a reservation?

In *Sheet View, Book View, Floor View, In-House Waitlist View and Future Waitlist View,* highlight the desired reservation once. On the bottom of the view, tap inside the *Reservation Notes or Guest Notes* field. The system displays a *Notes Pop Up Dialog*. Type the special request into the *Reservation Notes* field on the left and tap **Save**.

The *Notes* (N) column for the reservation slot will display a red flag to indicate that there is a reservation note or guest note for the reservation.

How do I block (or unblock) a reservation slot?

To block an empty time slot, highlight the empty slot and tap the **Change** button on the *Top Navigation Bar*. In the *Change Entry Dialog,* tap **Block Slot** to block this time slot. If prompted, enter a password that has access to this area to continue. The word "Blocked" appears in the name field, a red triangle appears in the "*" column, and a "0" is displayed in the party size column. You can enter a reason for the blocked slot by tapping the blocked slot and then tapping the inside of the *Reservation Notes* field at the bottom.

To unblock a reservation slot, highlight the blocked slot and tap the **Change** button on the *Top Navigation Bar*. In the *Change Entry Dialog,* tap the **Unblock Slot** button to unblock it. If prompted, enter a password that has access to this area to continue.

How do I make a reservation for a guest referred by a hotel concierge?

To make a reservation for a guest referred by a hotel concierge, tap the *Sheet View* or *Book View* on the *Side Navigation Bar*. Enter the guest's last name, first name, phone number or company name. If the correct guest name appears in the list (check the phone number), double-tap the name or tap the guest name once to highlight it and tap the **Select Guest** button. If there are no matches for your guest, tap the **New Guest** button to create a new guest record.

The *Make A Reservation Dialog* will appear. Tap the **Concierge** button at the bottom. The system displays a list of hotels and their concierges. Tap the name of the hotel to highlight it. Tap the concierge's name to highlight it. Tap the **Select** button. The hotel and concierge's name will appear in the lower left portion of the *Make A Reservation Dialog.*

If the hotel name does not appear on your list, tap the **Add** button at the bottom of the hotel list. Enter the hotel information and tap **Save**. To add a concierge's name to the list, tap the **Add** button at the bottom of the concierge list. Enter the concierge's name and tap **Save**.

How do I create a new time slot when taking a reservation?

To create a new time slot, tap the **Sheet View** or **Book View** button on the *Side Navigation Bar*. Tap the date on the *Top Navigation Bar* to view the *Calendar*. Navigate to and tap the desired date and tap **OK**. Tap the **Add** button on the *Top Navigation Bar* to see the *Insert Slot Dialog*. Begin setting slot attributes (time, party size, etc.) for the new slot. Tap **Save and Reserve**. Select an existing guest or add a new guest for the reservation. On the *Make A Reservation Dialog* enter the reservation details and tap **Save**. (A new slot is added and a red (+) is displayed in the "*" column next to the new slot.)

Note: Inserting slots can overbook your restaurant. It is important to insert slots only when needed.

How do I pre-assign tables?

On the *Sheet View, Book View, or Floor View*, double-tap the **Table** (Tbl) column next to the party's name, then type the table number and hit **Enter** to save your changes. Pre-assigning tables does not restrict you to seating the party only at that table. If you seat the party at another table, the *OpenTable* system will immediately update the table number with the actual table number.

Seating Guests

How do I seat a reservation?

You can seat guests from the *In-House Waitlist View* or in any of the three *Floor View Tabs: Reservations Tab*, *All Slots Tab*, or *(Active) Waitlist Tab*.

To seat a party from the *In-House Waitlist View* or the *Floor View / (Active) Waitlist Tab,* highlight the party by tapping the party once. Tap the **Seat** button in the lower right portion of the view. If you were in

the *In-House Waitlist View*, the system navigates to the *Floor View*. Tap the desired table to seat the party. The waiting party is seated and removed from the waitlist.

To seat a party on the *Floor View*, tap one of the three tabs in the upper right portion of the view and tap a reservation to highlight it. Seating is usually performed using the *Reservations Tab*. Tap the **Seat** button in the lower right portion of the view and then tap the desired table to seat the party. You can also seat a party by tapping the party's name and dragging and dropping the party onto the desired table.

How do I partially seat a reservation?

To partially seat a party from the *Sheet View, Book View, or Floor View*:

Tap a reservation to highlight it. Tap the **Status** button on the *Top Navigation Bar* and select the **Partially Seated** status. The system will switch to the *Floor View*. Tap the desired table to partially seat the party. The system changes the table color to show that the table is partially seated. When the party has completely arrived, tap the party's table on the *Floor View* and tap the **Seat** button in the lower right portion of the view to complete the seating.

How do I seat a walk-in?

On *Floor View* tap the **Walk-In** button at the bottom right. Choose the size of the walk-in party in the *Add Walk-In Party Dialog* and tap **OK**. You are now back in *Floor View*. Tap a table to seat the party. The name will appear as "Walk-In" in the newly created slot in the book. If you entered the guest's name, the name will appear as "Walk-In" followed by the guest's name. For example: "Walk-In (Smith, John)."

How do I configure floor timers in Floor View?

Floor timers help the host staff know how long a party has been seated or how much longer the party is expected to stay. To configure the floor timers, tap **Admin** on the *Side Navigation Bar*. Then tap the **Floor Management Settings** button. Tap the **Floor Settings Tab** to set the color and time settings for the new floor timers. For more information, refer to "Floor Timers" on page 148.

How do I show a party has left the table?

Once a party is done dining, you can change the status to *Bus Table* while the server staff clears and sets the table for the next party. When the table is ready, mark the table with the **Done** status so that you can seat the next party at that table.

In *Floor View*, tap the table and then tap the **Status** button on the *Top Navigation Bar*. Tap the **Done** status to show that this table is now available.

A faster way to clear the tables is to use the **Done** button at the bottom right in *Floor View*.

How do I change a party's status?

On the *Sheet View, Book View, or Floor Views*, highlight the reservation you wish to change by tapping the reservation once (on the *Floor View,* you can also tap a table with a seated party). Tap the **Status** button on the *Top Navigation Bar* and then tap the desired status.

How do I block (or unblock) a table?

On *Floor View*, tap an empty table and then tap the **Block Table** button in the lower right. The table is blocked and a red symbol appears on the table.

To unblock a table, go to the *Floor View* and tap the blocked table. The *Block Table* button changes to the *Unblock Table* button. Tap the button and the table is unblocked and the red symbol disappears.

Working with Waitlists

What is the difference between the In-House Waitlist, the Active Waitlist and the Future Waitlist?

The *In-House Waitlist View* is a full screen view that is accessed by tapping the **Waitlist** button on the *Side Navigation Bar*. The *In-House Waitlist View* is designed to keep track of guests that do not have a reservation and that are in the restaurant waiting for a table to dine during the current shift. You can track the guest's name, party size, quoted wait time, dining preferences, mobile phone #, and any pertinent notes (like a description of the person, pager #, cell phone, etc.).

The *Active Waitlist* is located on the *Floor View* (*Waitlist Tab* on the right side of the screen) and is an alternate view of the same guest waitlist that can be seen in the *In-House Waitlist View*.

The *Future Waitlist View* is accessed by tapping the FUTURE button on the *Side Navigation Bar* and is designed to keep track of guests that wish to dine on a future date that is already fully booked (like Valentine's Day for example). You can maintain the guest's name, date, preferred time, and party size on the *Future Waitlist View*.

How do I add a party to the In-House or Active Waitlists?

Tap the **In-House Waitlist View** button on the *Side Navigation Bar* to see the *In-House Waitlist View*. Tap the **Add** button on the *Top Navigation Bar*. Depending on your configuration, the system will prompt you to search the guest database for an existing guest or type in the guest's name. Select the appropriate party size and quoted wait time (both must be > 0). If configured, tap any **Preference** buttons to set dining preferences for the party. Add any notes, such as guest description, special requests, etc. To set the party status, tap the **Partially Arrived** or **All Arrived** button and tap **OK**. The party is added to both the *In-House Waitlist View* and the *Active Waitlist*.

How do I add notes to a waitlist party?

From the *In-House Waitlist View* or the *Floor View / Active Waitlist Tab*, find and double-tap the waitlist party that you want to edit. The *Edit Waitlist Party Dialog* is displayed. Make your desired changes and tap **OK** to save your changes.

How do I seat a party from the In-House or Active Waitlists?

From the *In-House Waitlist View* or the *Floor View / Active Waitlist Tab*, highlight the party you wish to seat by tapping the party once. Tap the **Seat** button in the lower right portion of the view. If you were in the *In-House Waitlist View*, the system navigates to the *Floor View*. Tap the desired table to seat the party. The waiting party is seated and removed from the waitlist.

Reservation and Guest Codes

What are Reservation and Guest Codes?

Reservation and guest codes are codes that you can create and assign to reservations and guests. The codes are helpful to indicate special requests, identify special guests, and segment reservations and guests into categories for reporting and analysis. For example, you can assign a reservation code called "Promo" for guests that are dining as a result of a marketing promotion. You can assign a guest code called "VIP" to your most important guests. An added benefit is that many of the *OpenTable* reports can be filtered by codes.

What is the difference between Reservation and Guest Codes?

Reservation codes are connected to a specific reservation for that day. Guest codes are associated with a specific guest and the codes appears on their guest record and on all current and future reservations. For example, you may assign a reservation code called "Birthday," which appears only for that reservation. However, when you assign a guest code called "Friend of Owner", the code appears whenever the guest makes a reservation.

How do I edit my Reservation or Guest Code lists?

Tap **Admin** on the *Side Navigation Bar.* Then tap the **Reservation & Guest Codes** button. On the left side of the view is the reservation codes and on the right side of the view is the guest codes. At the bottom of each column you can select the *Add, Change or Delete* button. Tap the appropriate button to update your reservation or guest codes.

I sometimes see a red or yellow triangle next to a reservation. What does that mean?

The red or yellow triangles that appear in the *Notes* (N) column on the *Sheet View, Book View*, and *Floor View* are indicators that the reservation has an important note or code attached to it. A red flag indicates that there is a reservation note or code for the reservation. A yellow flag indicates that there is a guest note or code for the reservation.

How do I list a guest as a VIP, a smoker, or in need of special seating or a special diet?

When making a reservation or when editing the guest's information, tap the *Guest Codes field,* select the desired codes from the guest codes list, and tap **Save** to save your changes. If a code does not exist for VIP, smoker, special seating, or special diet you can add a new guest code.

To add a new guest code, tap **Admin** on the *Side Navigation Bar.* Tap the **Reservation & Guest Codes** button. The right side of the screen displays the guest codes. At the bottom of the column you can select the *Add, Change* or *Delete* button. Tap the **Add** button to add a new guest code.

E-Mail

How do I send a reservation confirmation E-Mail?

Verify that you are connected to the web and that you have set-up your E-Mail settings, including a restaurant E-Mail address (all replies will be sent to the restaurant E-Mail address). For more information, refer to "E-Mail Settings" on page 172.

After booking a new reservation and tapping **Save** on the *Make A Reservation Dialog*, the system will display the *Confirm Reservation Dialog* (Note: You can configure to hide or display the *Confirm Reservation Dialog* under *System Settings*). If the guest has an E-Mail address in the system, the system will automat-

ically populate the E-Mail address field. If the guest does not have an E-Mail address in the system, you can enter one manually in the address field.

On the *Confirm Reservation Dialog* you can select:

- *E-Mail a Reminder the Morning of* option to have the system send a reminder E-Mail on the morning of the reservation. Tap the **Send Now** button to send the reservation reminder E-Mail. Note: If this is a reservation for today, the *E-Mail a Reminder the Morning of* option will be grayed out and disabled.

- *Do Not Send Marketing E-Mails* option to opt-out the guest from any Marketing E-Mails (they will still receive reservation confirmation and reminder E-Mails). This setting will be saved as part of the guest record.

- Manually enter an E-Mail address or change the pre-populated address, then tap the **Send Now** button to automatically save the entered E-Mail address into the guest's record.

Note: You can customize the text in the E-Mail in the *Custom E-Mail Text* field. Navigate to *Admin View / E-Mail Settings* button. E-Mail reminders for reservations made online at www.opentable.com are sent by the *OpenTable* Web site and NOT by the *OpenTable* system at the restaurant.

How do I resend a confirmation E-Mail?

You can resend a confirmation E-Mail by highlighting the reservation, tapping the **Change** button on the *Top Navigation Bar*, and then tapping **Send E-Mail Confirm** in the *Change Entry Dialog*. Tap **OK** to resend the E-Mail. Also, changes to a reservation's date, time or party size, or cancellation will generate a *Change/Cancel Reservation Dialog*. Tap **OK** to send a change or cancellation E-Mail confirmation.

How do I create a special E-Mail for certain guests?

The first step is to identify which guests will receive your E-Mail. To do this, you may want to generate a filtered report of guests with E-Mail addresses that fit your criteria. Once you've generated a list of E-Mail addresses, you'll need to compose your E-Mail and send the E-Mail.

1) Generating a Distribution List

To start, tap **Reports** on the *Side Navigation Bar* and then tap the **E-Mail** button. The system displays the *Edit Marketing E-Mail Dialog*. Tap the **Edit Address List** button. In the *Edit Address Dialog*, tap the **Add from DB...** button. If you want everyone with an E-Mail address to receive your E-Mail, tap the **Show All Guests** button to generate an unfiltered list. Depending on the number of guests that you have in the system, an unfiltered list of E-Mails may take several minutes to generate.

If you want to generate a filtered list, tap the **Show Filtered List of Guests** button - the report option tabs will be activated and it will allow you to select the options for your list.

In the *Report Options Tab*, you can filter your list by: Dined within a specific date range, Dined more than a minimum number of times, Dined within specific shifts and / or show guests who have been modified within a date range.

Tap the *Addresses Tab* to filter your report by state, city, zip / postal code or area code (US and Canada only). Check the desired address option (state, city, zip / postal code, and area code) to display a list of values. Press the **Ctrl** key on the keyboard to select more than one item. Note: You can only filter addresses using one of these four criteria. You cannot combine criteria.

Tap the *Reservation and Guest Codes Tab* to see the next set of options. Filter the report by selecting the desired reservation and / or guest codes. To select multiple codes, hold down the **Ctrl** key on your keyboard and tap each code. Tap the **And** or **Or** button to use the desired combination of codes.

Tap the **Generate E-Mail** button at the bottom of your desired report tab to generate an E-Mail list. All guests that satisfy your selection criteria AND that have an E-Mail address will be selected for this E-Mail.

2) Editing Your E-Mail List

Next, in the *To Field* on the *Edit Marketing E-Mail Dialog* you'll see the distribution list for your Marketing E-Mail. To edit your E-Mail address list, tap the **Edit Address List** button. The *Edit Address List Dialog* is displayed.

To delete individual E-Mail addresses, hold down the **Ctrl** key and tap the E-Mail address to be deleted. To select several E-Mail addresses in a row, tap the first entry, hold down the **Shift** key, and tap the last entry to highlight the block of E-Mail addresses. Tap the **Delete Selected** button to remove these E-Mail addresses.

To add individual E-Mail addresses, tap the **Add Single ...** button, enter the E-Mail address on the *Add Single E-Mail Address Dialog*, and tap **OK**.

To change the filtering criteria, tap the **Add from DB ...** button to return to the *Guest E-Mail Options Dialog*.

To delete all the E-Mail addresses in the distribution list, tap the **Delete All** button.

3) Composing Your E-Mail

Once your E-Mail Distribution list is set, you are now ready to compose your E-Mail.

Tap the **Subject field** and type in a subject line. A subject line is required for sending E-Mails. Tap the **Body field** and compose your E-Mail. You can format your E-Mail by highlighting the text and tapping the formatting buttons. Other options for creating content include:

Cutting and pasting content for your E-Mail from other applications or importing content saved in HTML format (Hypertext Markup Language) from applications like Microsoft Word. Tap the **Import HTML** button to browse the file location on your computer and import the HTML file into the E-Mail body.

Tap the **Save** icon on the editing toolbar to save your HTML E-Mail to an HTML file. Select the directory location and file name for your HTML file on the *Save HTML Document Dialog* and tap **Save**. You can load the saved file later by tapping the **Import HTML** button.

To send any attachments in your E-Mail, tap the **Attachments** icon in the *Edit Marketing E-Mail Dialog* to display the *Edit Attachment List Dialog*. Tap the **Add ...** button to view the *Attach File Dialog*. Browse for your file and tap the **Open** button to select it. Tap the **OK** button to attach the file to your E-Mail. You can attach up to three documents to a Marketing E-Mail.

4) Sending Your E-Mail

Finally, once your E-Mail address list, subject line, and message are complete, tap the **Preview** button on the editing toolbar to preview your E-Mail.

Send a test E-Mail to your own E-Mail address by tapping the **Send Test E-Mail** button (note, you cannot send the E-Mail without first sending a test E-Mail) and entering your E-Mail address. You can send test E-Mails to multiple addresses. Enter the E-Mail addresses and separate them with commas. Sending a test E-Mail to your own account is a good practice and allows you to review what your E-Mail looks like before sending it to a larger guest distribution list.

Sending a test E-Mail enables the **Send** button. If you are satisfied with your E-Mail, tap the **Send** button to send your E-Mail to the distribution list.

Reporting

How do I print the reservation report for a shift?

Tap **Reports** on the *Side Navigation Bar* and tap the **Reservation & Cancellation** button. Tap the **Today** button for both your *Start and End Dates*. Tap the desired shift and tap the **Generate Report** button to create the report. Tap the **Print** button to print the report.

How do I create mailing labels for specific guests?

Tap **Reports** on the *Side Navigation Bar*. Tap the **Mailing Labels** button and the system displays the *Guest Mailing Labels Options Dialog*. Tap the **Show All Guests** button to generate an unfiltered report. Depending on the number of guests that you have in the system, an unfiltered report may take several minutes to generate.

Tap the **Show Filtered List of Guests** button to generate a filtered report - all the report option tabs will be activated and you can configure the options for your report.

Tap the **Report Options Tab** and tap each button to see the configuration options. You can create mailing labels for guests that: Dined within a specific date range, Dined more than a minimum number of times, Dined within specific shifts and / or show guests who heaven modified within a date range.

Tap the **Addresses Tab** to configure the report to filter by state, city, zip / postal code, or area code (US and Canada only). Note: You can only filter addresses using one of these four criteria. You cannot combine criteria. Check the desired address option (state, city, zip / postal code, and area code) to display a list of values for the option. Press the **Ctrl** key on the keyboard and tap each state that you want to select.

Tap the **Reservation and Guest Codes Tab** to see the next set of options. On this tab, you can filter the report by selecting the desired reservation and guest codes. To select multiple codes, hold down the **Ctrl** key on your keyboard and tap each code that you want to select. Tap the **And** or **Or** button to use the desired combination of codes.

Tap the **Output Options** tab to change the sort order of the *Mailing Labels* report. Tap the dropdown list controls to select the desired fields to sort by. On this tab, you can also select the Company field to display on the report. Tap the **Company** button to display it on the report (the button will look like it has been pressed in). Tap the **Generate Labels** button to create your mailing labels.

Note: The *OpenTable* system references Avery (a standard label manufacturer) label types for printing mailing labels. In order for a mailing label to print for a guest, the guest must have the following fields: Last Name, Address1 or Address 2, City, and Zip / Postal Code.

How do I find out how many covers came in during the last month?

Tap **Reports** on the *Side Navigation Bar* and tap the **Close of Shift** button. Choose the first day of last month as your start date and the last day of last month as your end Date. Tap the **Monthly** button and then tap the **Generate Report** button to create the report.

How do I find out how many web reservations we had last month?

Tap **Reports** on the *Side Navigation Bar* and tap the **Reservations** button. Choose the first day of last month as your start date and the last day of last month as your end date. Tap the **Reservation and Guest Codes Tab**. Tap the **Web Reservation** code in the *Reservation Codes List* (on the left). Tap the **Generate Report** button to create the report.

Chapter 22: OpenTable Equipment

In the event that you need to call the *OpenTable* support desk for assistance, the support staff may ask you to perform various tasks with the *OpenTable* equipment to help troubleshoot the problem. We have provided several pictures of the equipment to assist you in identifying the correct hardware. Please note that your equipment may be slightly different, depending on your specific environment.

DELL GX60 (Server/Client Terminal) - Front View

Figure 22-1: Dell GX 60 - Front View

1	CD Drive	2	USB Ports	3	Power Button

DELL GX60 (Server/Client Terminal) - Back View

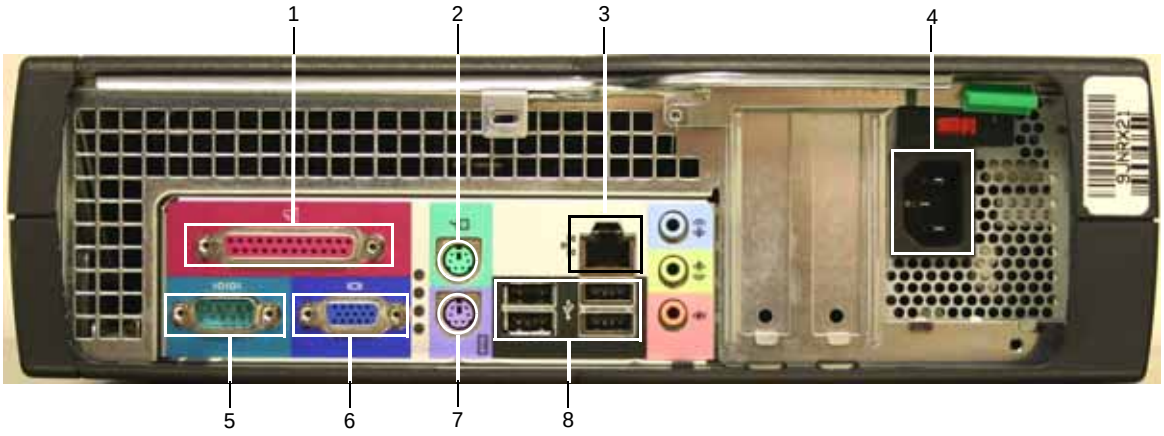


Figure 22-2: Dell GX 60 - Back View

1	Parallel Port	4	Power Outlet	7	Keyboard Port
2	Mouse Port	5	Serial Port	8	USB Ports
3	Network Port	6	Video Port		

IBM S50 / M51 (Server/Client Terminal) - Front View

Figure 22-3: IBM S50 / M51 - Front View

IBM S50 / M51 (Server/Client Terminal) - Back View

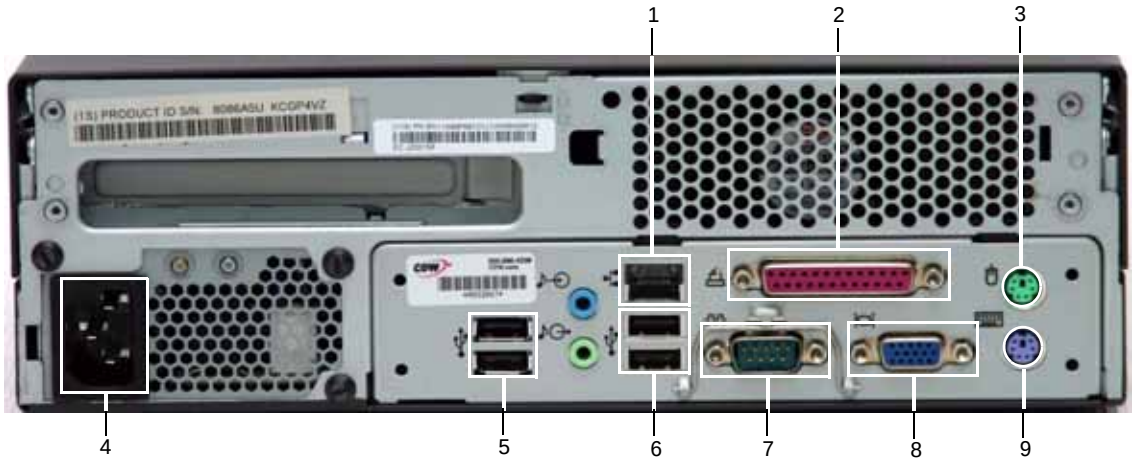


Figure 22-4: IBM S50 / M51 - Back View

1	Network Port	4	Power Outlet	7	Serial Port
2	Parallel Port	5	USB Ports	8	Video Port
3	Mouse Port	6	USB Ports	9	Keyboard Port

Posiflex Jiva TP5700/5800 (Server/Client Terminal) - Front View

Figure 22-5: Posiflex Jiva TP5700/5800 - Front View (Touchscreen)

Posiflex Jiva TP5700/5800 (Server/Client Terminal) - Bottom View

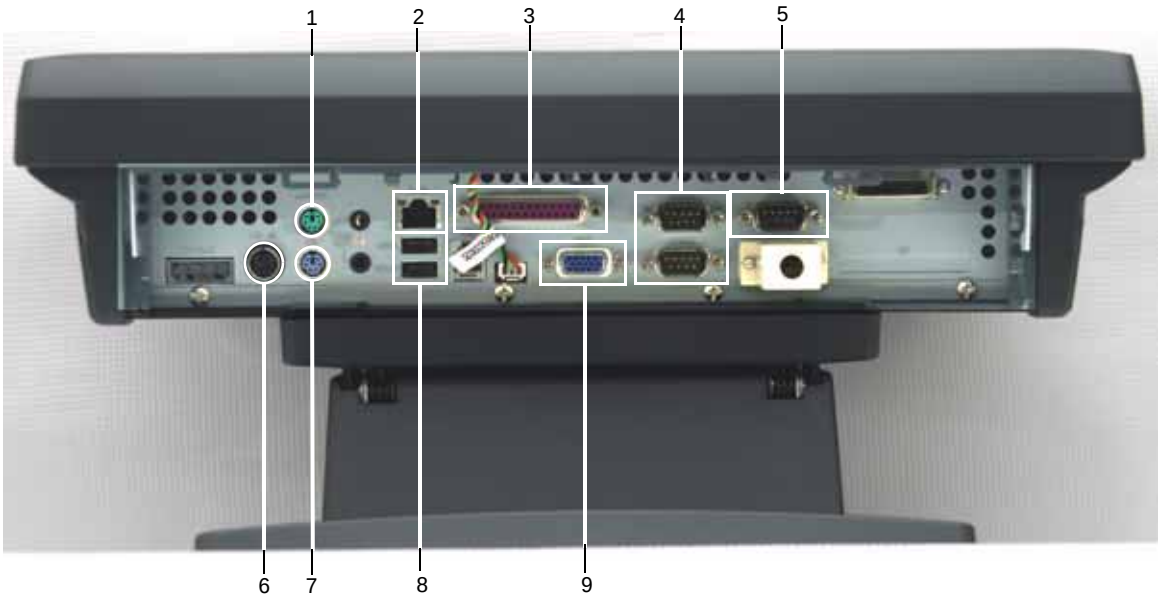


Figure 22-6: Posiflex Jiva TP5700/5800 - Bottom View

1	Mouse Port	4	Serial Ports	7	Mouse Port
2	Network Port	5	Serial Port	8	USB Ports
3	Parallel Port	6	Power Outlet	9	Video Port

Posiflex Jiva TP5700/5800 (Server/Client Terminal) - Left Side

Figure 22-7: Posiflex Jiva TP5700/5800 - Power Button on Left Side

Posiflex Jiva TP5700/5800 (Server/Client Terminal) - Right Side

Figure 22-8: Posiflex Jiva TP5700/5800 - Screen Tilt Adjustment Switch on Right Side

Netgear FS605 Switch - Front View

Figure 22-9: Netgear FS605 Switch - Power Indicator on Front View

Netgear RP614 Router - Front View

Figure 22-10: Netgear RP614 Router - Power Indicator on Front View

Netgear RP614 Router - Back View

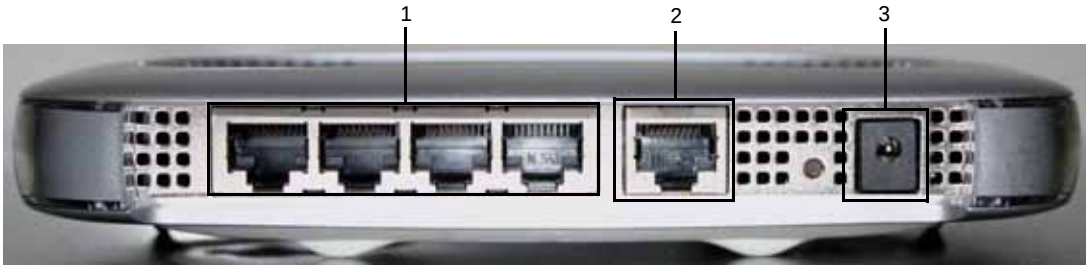


Figure 22-11: Netgear RP614 Router - Back View

1	Network Ports	2	DSL “In” Port	3	Power Outlet

Netgear EN104 Ethernet Hub - Front View

Figure 22-12: Netgear EN104 Ethernet Hub - Uplink Button on Front View

ELO Touchscreen - Back View

Figure 22-13: ELO Touchscreen - Back View

1	Connect to Serial Port on Computer	2	Power Outlet	3	Connect to Video Port on Computer

Appendix

Copyright Notice

The OpenTable Software uses Advanced Encryption Standard (AES) algorithms and code. The following is a copyright notice for AES.

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Support Information

Customer Support in North America

United States, Canada, Mexico, Puerto Rico:

Customer Support:	1-800-OPENTABLE (1-800-673-6822) or +1 415-344-4204 (Locally)
Support Hours:	Everyday - 6:00 AM to 8:00 PM Pacific Standard Time
Sales E-Mail:	Sales@opentable.com
Internet:	www.opentable.com
Fax:	+1 415-267-0944
U.S. Mail and Shipments:	OpenTable, Inc. 799 Market Street, 4th Floor San Francisco, CA 94103

Customer Support in Europe

United Kingdom and Ireland:

Customer Support:	0845 351 3515
Support Hours:	24 hours - 7 days a week
E-Mail:	Info@opentable.com
Sales E-Mail:	UKSales@opentable.com
Internet:	www.opentable.co.uk
Fax:	0207 170 4054
UK/Ireland Mail and Shipments:	OpenTable Europe Ltd. Winchester House 259-269 Old Marylebone Road London NW1 5RA

Germany:

Customer Support:	0800 363 8466
Support Hours:	24 hours - 7 days a week (maximum 30 minute call back response)
E-Mail:	support_germany@opentable.com
Sales E-Mail:	verkauf@opentable.com
Internet:	www.opentable.de
Fax:	(0)69 710 455 196
Germany Mail and Shipments	OpenTable Deutschland Bockenheimer Landstrasse 17 - 19 60325 Frankfurt Germany

Spain:

Customer Support:	900 801 611
Support Hours:	24 hours - 7 days a week (maximum 30 minute call back response)
E-Mail:	support_spain@opentable.com
Sales E-Mail:	ventas@opentable.com
Internet:	www.opentable.es
Fax:	91 454 7023
Spain Mail and Shipments:	OpenTable España Carrera de San Jerónimo 15 Madrid 28014 España

Customer Support in Asia

Japan:

Customer Support:	+81 50-5533-5505
Support Hours:	Monday - Sunday - 11:00 AM to 6:00 PM Japan Standard Time
E-Mail:	Use the OpenTable system to send an E-Mail. Tap Admin / Contact OpenTable
Internet:	www.opentable.jp
Japan Mail and Shipments:	OpenTable K.K. TTS Minami-Aoyama Bldg. 6F 6-12-1 Minami-Aoyama Minato-ku, Tokyo 107-0062 Japan

Hong Kong and Singapore*

Customer Support:	+1 415-344-4204
Support Hours:	Everyday - 6:00 AM to 8:00 PM Pacific Standard Time
Sales E-Mail:	Sales@opentable.com
Internet:	www.opentable.com
Fax:	1-415-267-0944
U.S. Mail and Shipments:	OpenTable, Inc. 799 Market Street, 4th Floor San Francisco, CA 94103

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